



# **501 TA366: Absence Management Maintenance**

Instructor Led Training



# Welcome to Cardinal Training

This training provides participants with the skills and information necessary to use Cardinal and is not intended to replace existing Commonwealth and/or agency policies.

This course, and the supplemental resources listed below, are located on the Cardinal website ([www.cardinalproject.virginia.gov](http://www.cardinalproject.virginia.gov)) under Training.

Cardinal Reports Catalogs are located on the Cardinal website under Resources:

- Instructor led and web based training course materials
- Job aids on topics across all functional areas
- Variety of simulations
- Glossary of frequently used terms

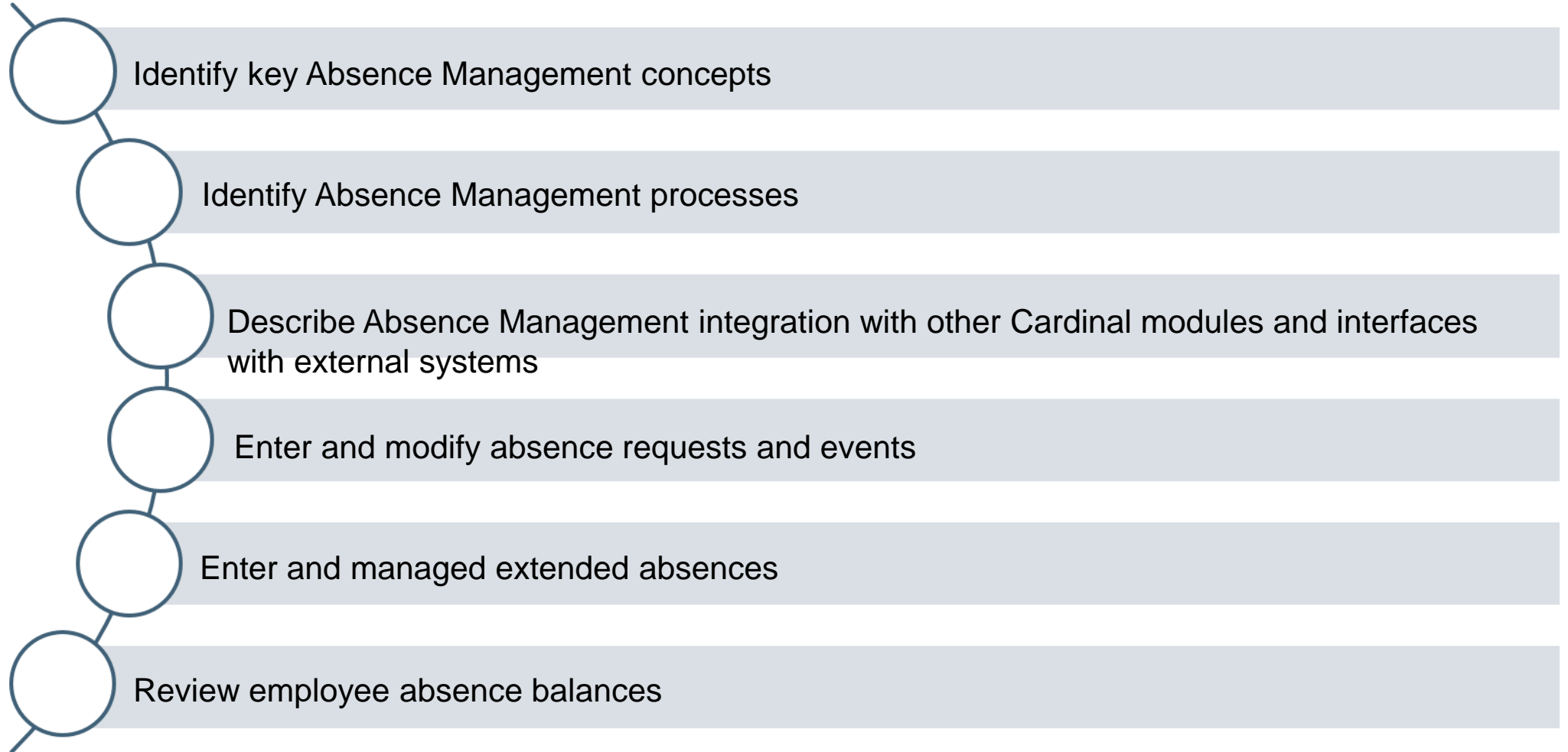
The Cardinal screenshots included in this training course show system pages and processes that some users may not have access to due to security roles and/or how specific responsibilities relate to the overall transaction or process being discussed.

For a list of available roles and descriptions, see the Statewide Cardinal Security Handbook on the Cardinal website in the Security section under Resources.



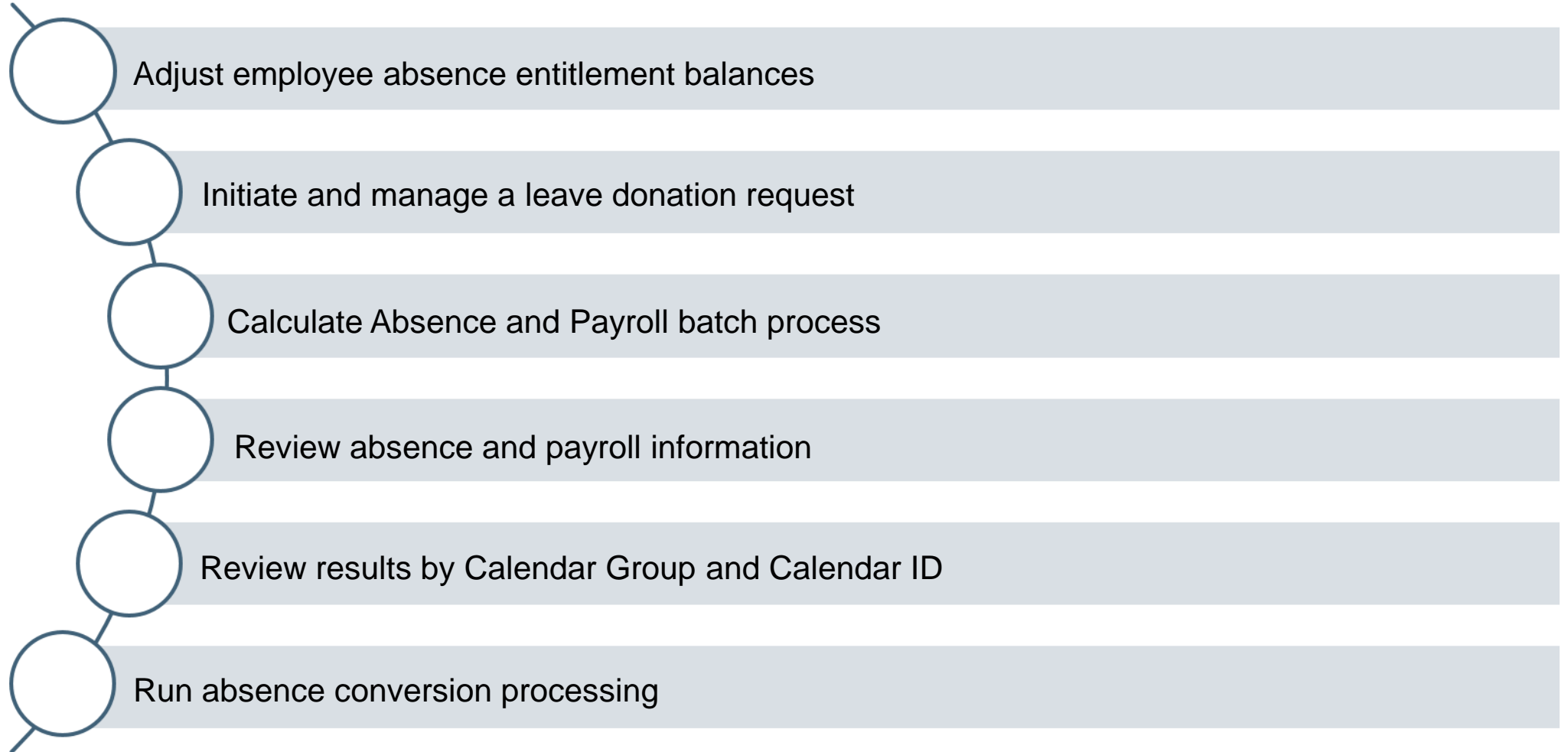
# Course Objectives

After completing this course, you will be able to:





## Course Objectives (continued)





# Agenda

1

Understanding Absence Management Maintenance

2

Maintaining Absences

3

Adjusting Absence Entitlement Balances

4

Managing Absence and Payroll Processing

5

Absence Management Maintenance Hands-On Practice



# Lesson 1: Introduction

1

## Understanding Absence Management Maintenance

This lesson covers the following topics:

- Time and Attendance Overview
- Key Concepts
- Time and Attendance Processes
- Integration and Interfaces



# Time and Attendance Overview

The Time and Attendance functional area is comprised of two modules:

## Time and Labor

Involves employee setup, input of time and attendance, payroll integration, and cost allocation

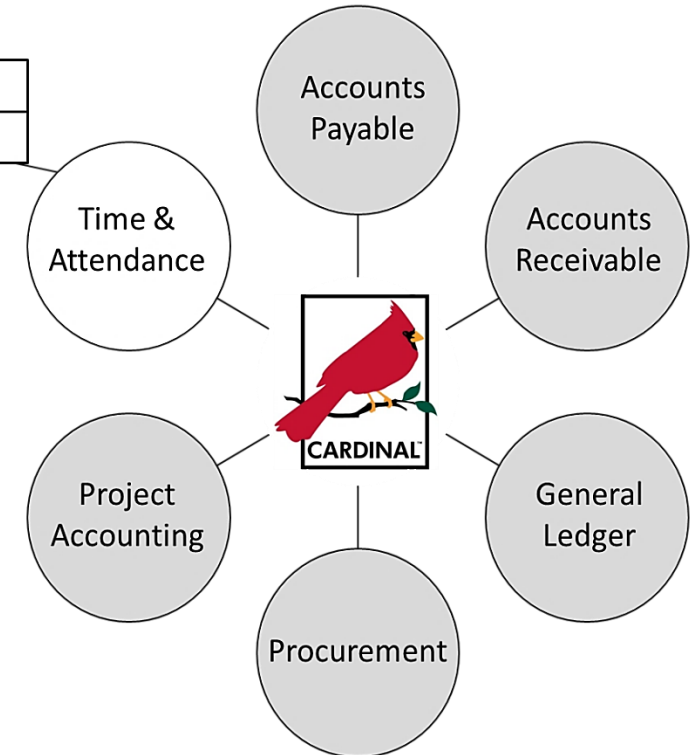
## Absence Management

Involves the processing and managing of employee absences

### Modules

	Time & Labor	
	Absence Management	

### Cardinal Functional Areas





# Key Concepts

Some key concepts in Time and Attendance Absence Management include:

- Submitted absences are routed immediately to the supervisor for approval.
- The **Calculate Absence and Payroll (Absence Calc)** function processes approved absences and calculates absence entitlements and balances. This process runs daily in batch at 11:30 AM, 3:30 PM, and 3:30 AM.
- While the Absence Calc process calculates absences in the current open pay period, the balances displayed on the employee's timesheet and balance history pages are from the prior closed pay period (i.e. absence calendar). They do not reflect accruals earned or hours taken after that pay period end date.
- When a pay period (absence calendar) is closed on salary allocation day, the Absence Calc process is run with the **Finalize** option which finalizes all absence calculations. Once the pay period is closed and this Absence Calc option is run, the calculated absence and balance values become permanently recorded.
- Adjustments can be made to absences takes and entitlements in a prior period. These changes are processed in the current pay period (absence calendar). Previous periods and balances are recalculated depending upon the change and are recorded as a new version of the original absence calendar results; the original version of the absence calendar results does not change.



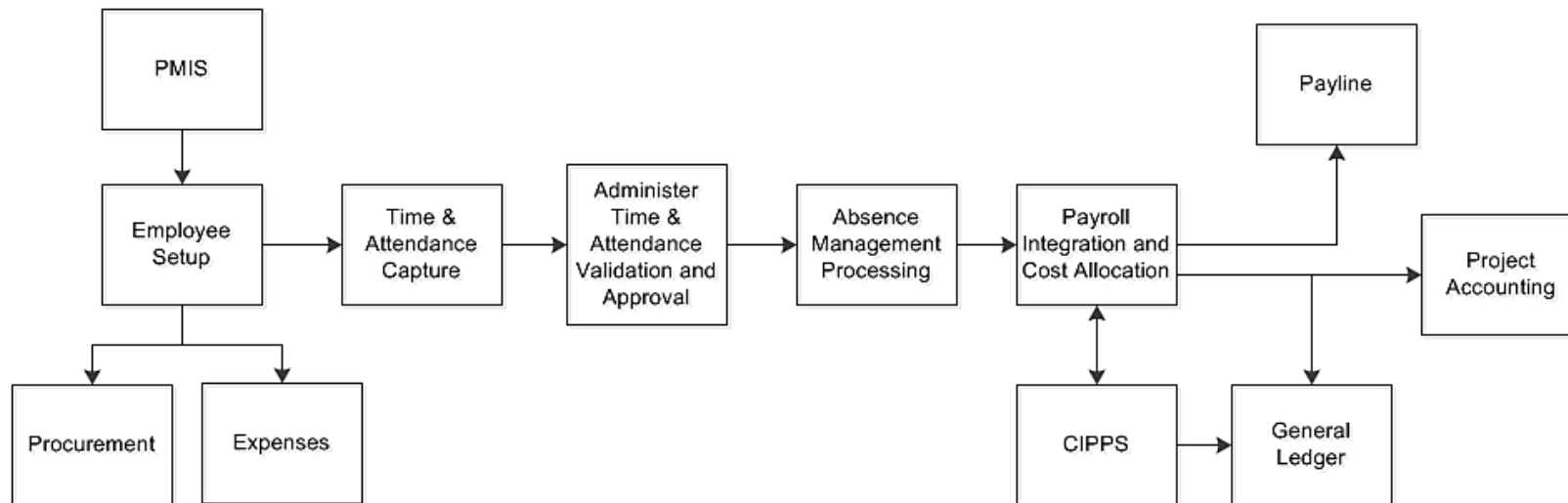


# Time and Attendance Processes

Absence Management is one of the five sub-processes within Time and Attendance:

- Employee Setup
- Time and Attendance Capture
- Administer Time and Attendance Validation and Approval
- Absence Management Processing
- Payroll Integration and Cost Allocation

The following diagram provides an overview of the business process flow and the various integrations and interfaces.

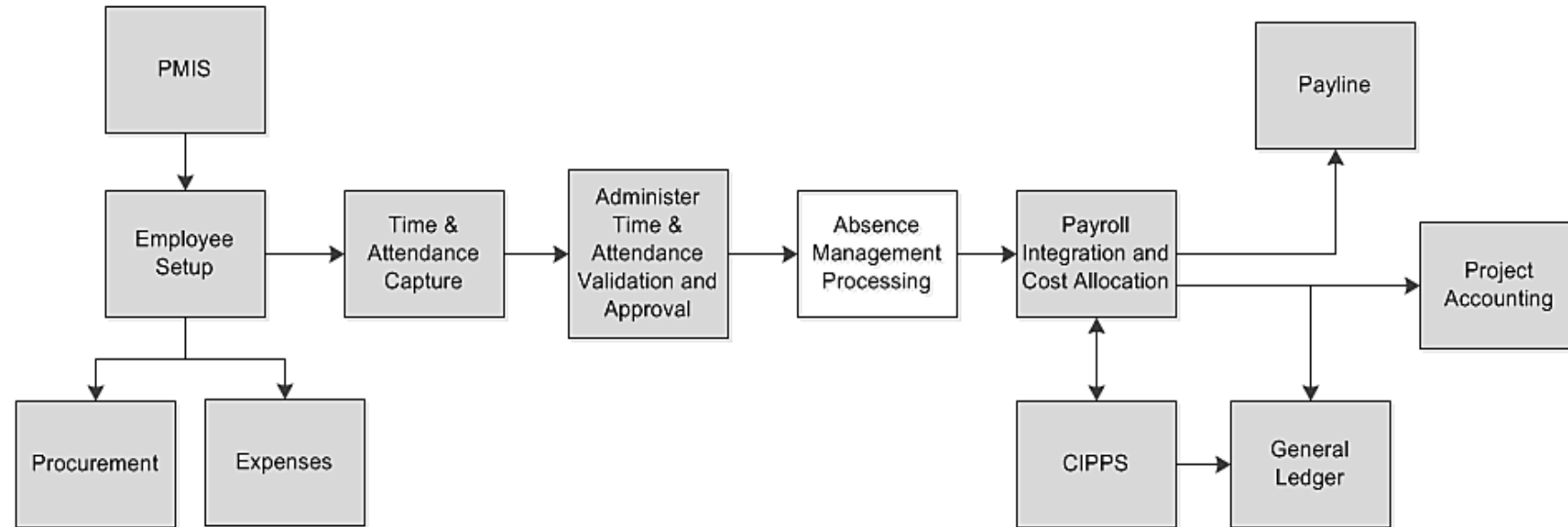




# Absence Management Processing

This process flow illustrates what happens when an employee has absence events and/or time on their timesheet. The Absence Management process calculates the available absence entitlement balances by adding or deducting accruals, takes, and adjustments.

This information is also used to calculate and allocate payroll costs.

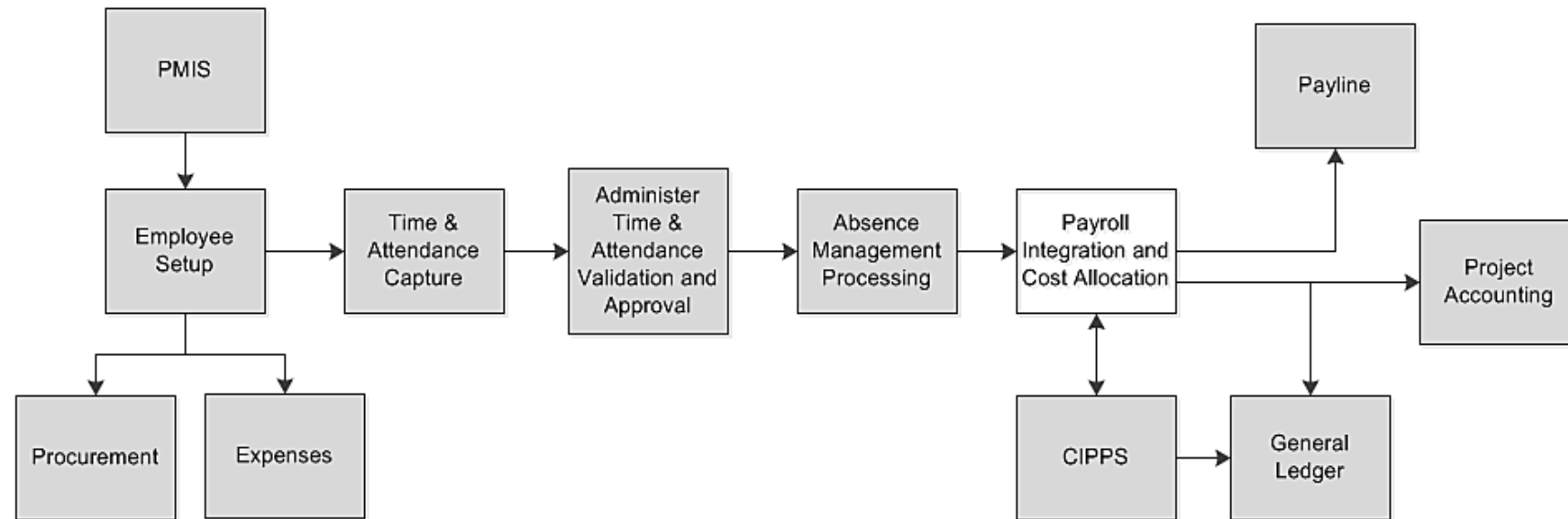




# Payroll Integration and Cost Allocation

Cardinal uses time and charge distribution information from employee timesheets to allocate payroll costs according to the distributions entered on timesheets.

That information is shared with the General Ledger and Project Accounting functional areas and can be tracked at the employee level to support Federal billing.

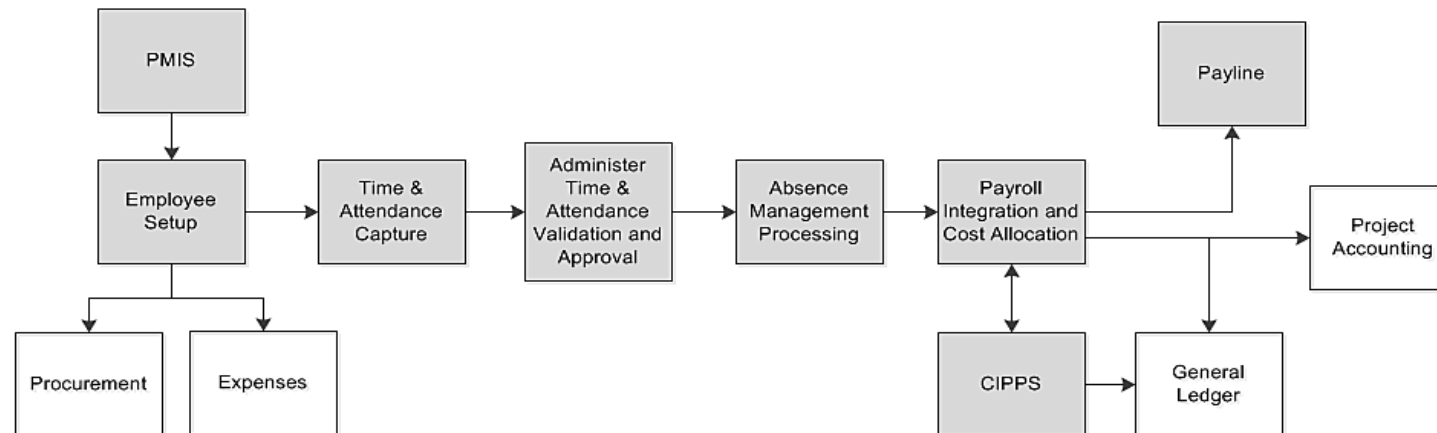




# Time and Attendance Integration with Other Cardinal Modules

Time and Attendance integrates with other Cardinal modules:

- **Procurement** - Employee information that is created during the Time and Attendance Employee Setup process is used by the Small Purchase Charge Card Program in the Procurement module.
- **Expenses** - Employee information that is created during the Time and Attendance Employee Setup process is used by the Expenses module in the Accounts Payable functional area to process employee travel and business expense reimbursements.
- **Project Accounting** - Employee labor costs that are charged to projects are sent to Project Accounting when employee pay is distributed according to the charge distribution entered on employee timesheets.
- **General Ledger** - Employee labor charges are sent to General Ledger when employee pay is distributed according to the charge distribution entered on employee timesheets.





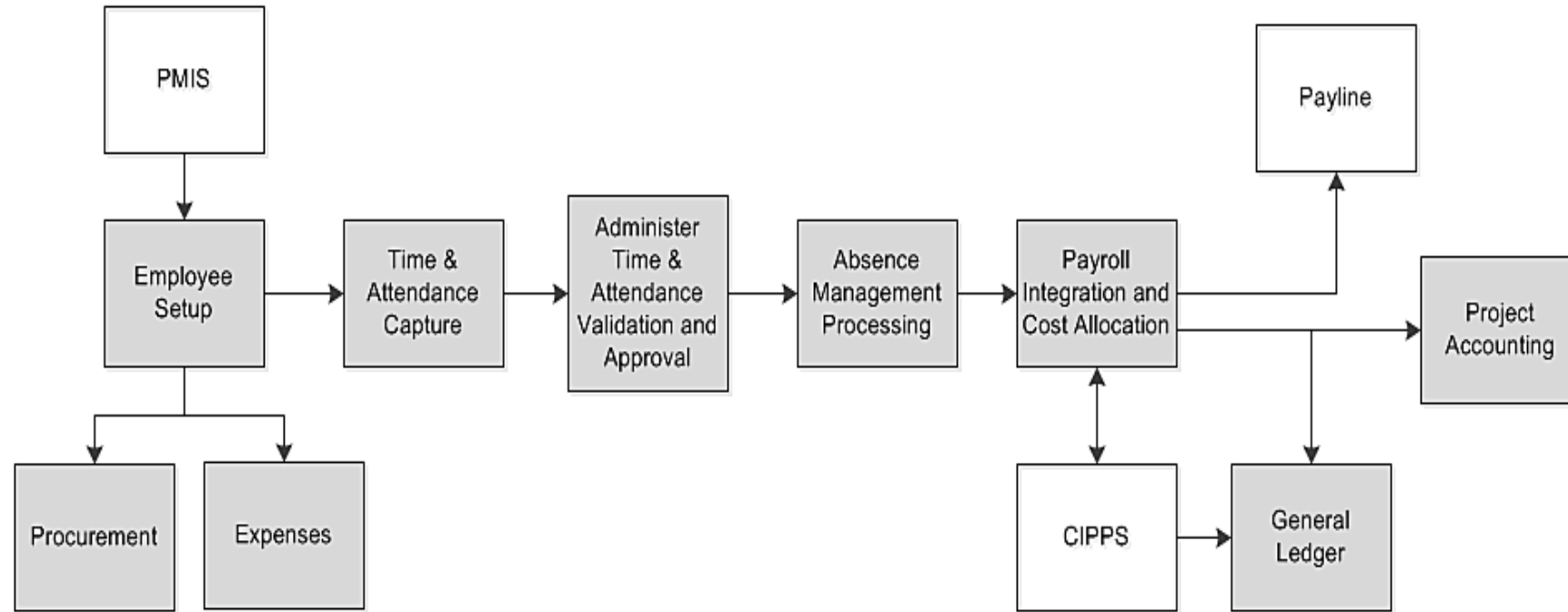
# Time and Attendance Interfaces

Time and Attendance also interfaces with several external systems:

- **Personnel Management Information System (PMIS)** - When a new position is created or an existing position is changed, the position information is first entered into PMIS. PMIS then sends the information to Cardinal to establish position data in Cardinal Time and Attendance. When employees are hired or change positions, etc., their personnel data is first entered into PMIS. PMIS then sends the employee information (e.g., employee name, address, role, hourly, salaried) to Cardinal Time and Attendance to create or update an employee profile.
- **Commonwealth Integrated Payroll & Personnel System (CIPPS)** - Timesheet entries for hourly employees and overtime entries for both hourly and salaried employees are sent to CIPPS to create employee pay. After the payroll process is complete, CIPPS provides Expanded Current Earnings information to Cardinal. This information is then used by Cardinal along with employee timesheet charge distribution information to allocate costs to the appropriate projects and budgets.
- **Department of Accounts – Payline** - Absence information is sent to the Department of Accounts and allows employees to view their absence balances via Payline.



# Time and Attendance Interfaces (continued)





# Lesson 1: Summary

1

## Understanding Absence Management Maintenance

In this lesson, you learned:

- The Absence Management process calculates available absence entitlement balances
- Absence Management data is used in the allocation process along with productive non-productive time.
- Absence Management integrates with other Cardinal modules, including Time and Attendance, Procurement, Expenses, Project Accounting, and General Ledger



# Lesson 2: Introduction

2

## Maintaining Absences

This lesson covers the following topics:

- Navigation to Absence Management
- Entering and Modifying Absence Requests and Events
- Entering and Managing Extended Absences
- Reviewing Employee Absence Balances





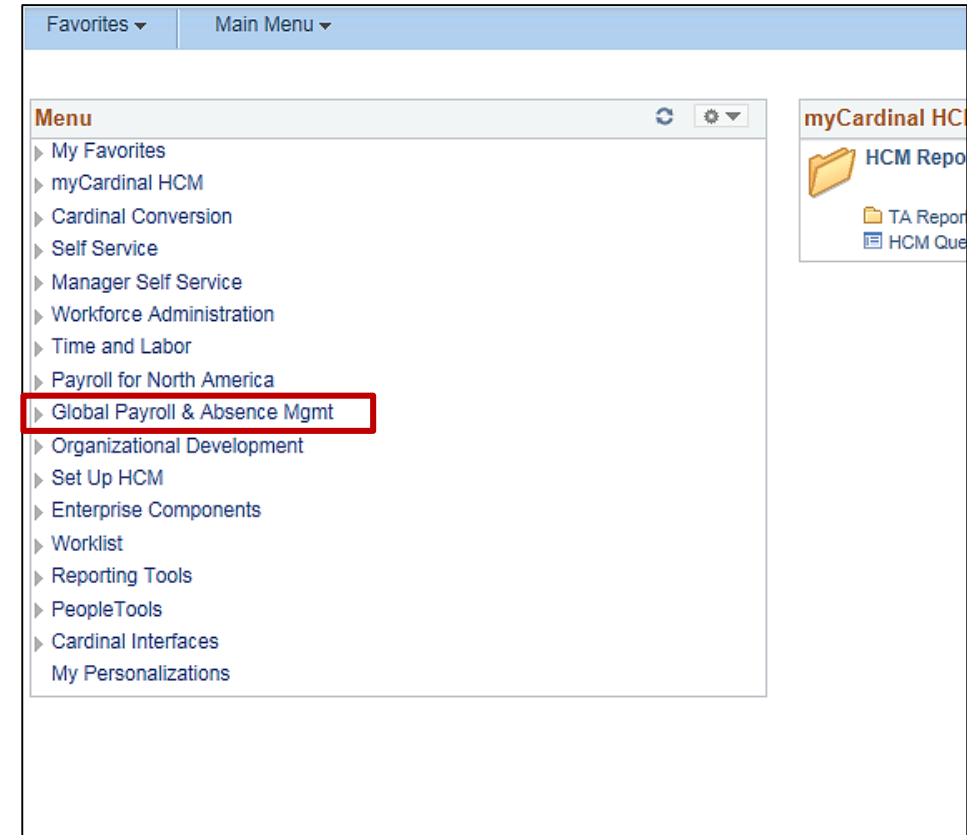
# Navigating to Absence Management

To perform administrative tasks for Absence Management, first log into the Cardinal Human Capital Management (HCM) application.

Once in Cardinal HCM, navigate to pages within the **Global Payroll & Absence Mgmt** menu.

Navigate using the following path:

**Cardinal FIN > Cardinal HCM > Main Menu > Global Payroll & Absence Mgmt > Payee Data > Maintain Absences**

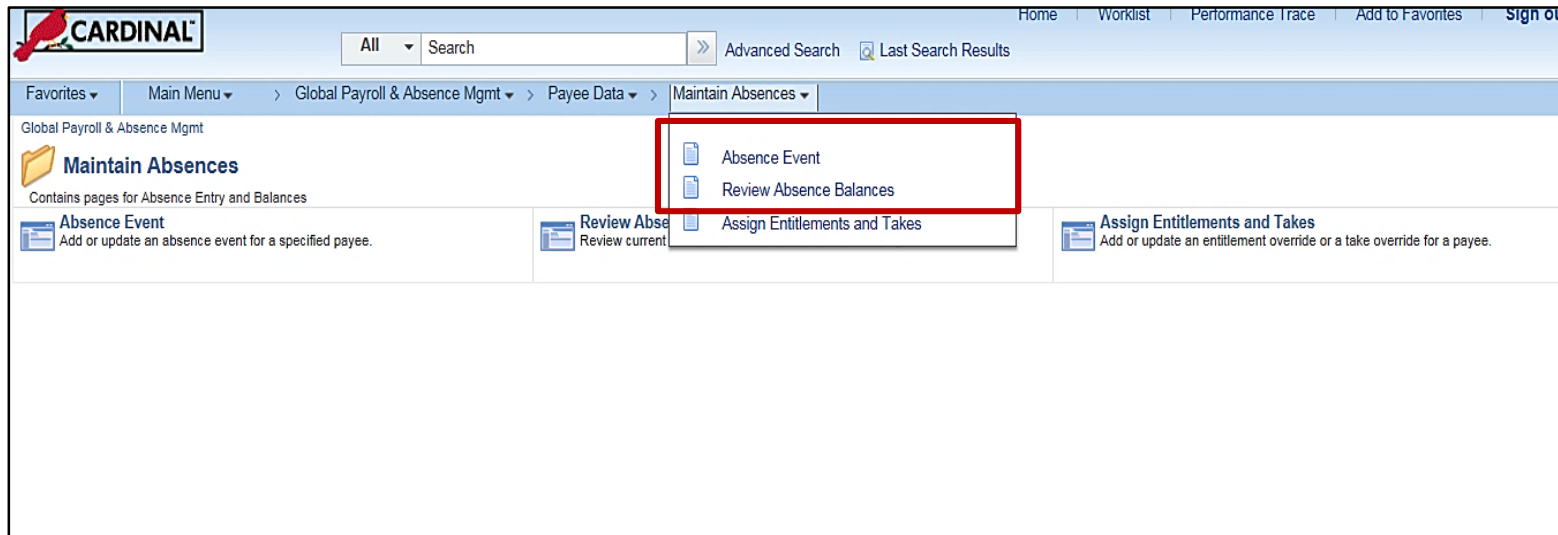




# Maintaining Absences and Payee Data Pages

From the **Payee Data > Maintain Absences** page the following can be performed:

- Enter and modify employee absence requests and events.
- Enter and manage extended employee absences.
- Review Absence Balances.





# Reviewing the Absence Event Page

The Absence Management Administrator can enter, edit, void, or delete an absence event on behalf of an employee starting from the **Absence Event** page.

- Enter the search criteria (e.g., **Empl ID, First Name, Last Name**) and click the **Search** button. The **Absence Event** page displays for the selected employee.
- If more than one employee fits the criteria, a list displays at the bottom of the page.
- Select the desired employee.

Favorites ▾ Main Menu ▾ > Global Payroll & Absence Mgmt ▾ > Payee Data ▾ > Maintain Absences ▾ > Absence Event

### Absence Event

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

**Search Criteria**

Empl ID

begins with ▾

Empl Record

= ▾

Name

begins with ▾

Last Name

begins with ▾

DOE ×

Second Last Name

begins with ▾

Alternate Character Name

begins with ▾

Middle Name

begins with ▾

☐ Case Sensitive

Search

Clear

Basic Search

Save Search Criteria



# Reviewing the Absence Event Page (Continued)

The employee's **Absence Event** page lists absences for the employee based on the **From** and **Through** dates specified. The **From** and **Through** date fields auto-populate and can be changed. If the dates are changed, click the **Refresh** button to view the results.

Favorites ▾

Main Menu ▾

> Global Payroll & Absence Mgmt ▾

> Payee Data ▾

> Maintain Absences ▾

> Absence Event

New Window | Help | Personalize Page |

Absence Event Entry

Forecast Messages

Employee ID EMP00000030    Empl Record 0    Name **EDGAR POE**

From 11/10/2016    Through 05/09/2017    

Refresh

Forecast

Absence Events ?

Personalize | Find | View All | First 1

Absence Take

Process Status

Forecast Value

*Absence Take	Description	*Begin Date	End Date	Partial Hours	*Process Action	Voided	Original Begin Date	Details	Entry Source	Workflow Status
VAC TAKE ELEM	Vacation	02/13/2017	02/13/2017		Normal ▾	<input type="checkbox"/>	02/13/2017	Details	Manager Timesheet	Saved
SDP TAKE ELEM	VSDP Sick Leave	01/23/2017	01/27/2017		Normal ▾	<input type="checkbox"/>	01/23/2017	Details	Employee Timesheet	Approved
FML TAKE ELEM	Family and Medical Leave	01/23/2017	01/31/2017		Normal ▾	<input type="checkbox"/>	01/23/2017	Details	Administrator Absence Event	Submitted
VAC TAKE ELEM	Vacation	01/18/2017	01/18/2017		Normal ▾	<input type="checkbox"/>	01/18/2017	Details	Employee Timesheet	Cancelled
VAC TAKE ELEM	Vacation	01/10/2017	01/10/2017		Normal ▾	<input type="checkbox"/>	01/10/2017	Details	Employee Timesheet	Submitted

Save

Return to Search

Notify

Refresh

Absence Event Entry | Forecast Messages



# Options for Reviewing Employee Absence Data

There are two tabs located at the top of the page:

- **Absence Event Entry** - Displays all absence requests and events that have been entered for the employee. This is the default tab for this page.
- **Forecast Messages** - Displays errors or warnings generated by the forecasting process on the **Absence Event** page. If errors are corrected and the forecasting process is rerun, the forecast messages will be removed.

Favorites ▾Main Menu ▾> Global Payroll & Absence Mgmt ▾> Payee Data ▾> Maintain Absences ▾> Absence Event

New Window | Help | Personalize Page |

Absence Event EntryForecast Messages

Employee ID EMP00000030Empl Record 0Name EDGAR POE  
From 11/10/2016Through 05/09/2017RefreshForecast

Absence Events ?Personalize | Find | View All | First 1

Absence TakeProcess StatusForecast Value

*Absence Take	Description	*Begin Date	End Date	Partial Hours	*Process Action	Voided	Original Begin Date	Details	Entry Source	Workflow Status
VAC TAKE ELEM	Vacation	02/13/2017	02/13/2017		Normal ▾	<input type="checkbox"/>	02/13/2017	Details	Manager Timesheet	Saved
SDP TAKE ELEM	VSDP Sick Leave	01/23/2017	01/27/2017		Normal ▾	<input type="checkbox"/>	01/23/2017	Details	Employee Timesheet	Approved
FML TAKE ELEM	Family and Medical Leave	01/23/2017	01/31/2017		Normal ▾	<input type="checkbox"/>	01/23/2017	Details	Administrator Absence Event	Submitted
VAC TAKE ELEM	Vacation	01/18/2017	01/18/2017		Normal ▾	<input type="checkbox"/>	01/18/2017	Details	Employee Timesheet	Cancelled
VAC TAKE ELEM	Vacation	01/10/2017	01/10/2017		Normal ▾	<input type="checkbox"/>	01/10/2017	Details	Employee Timesheet	Submitted

SaveReturn to SearchNotifyRefresh

Absence Event Entry | Forecast Messages

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# Reviewing Absence Event Entry Data

The header on the **Absence Event Entry** tab contains data about the employee, e.g., **Employee ID** (number), **Empl Record**, and **Name**.

**From** and **Through** fields identify the date range of data displayed in the **Absence Events** section. Click the **Refresh** button after updating the **From** or **Through** dates.

If there are more than 10 absences, click the **View All** link. This will activate the scroll bar in order to see all other absences.

The **Forecast** button allows an Administrator to ensure that the employee is eligible for the absence type selected and has sufficient balances available for use.

Navigation: Favorites ▾ Main Menu ▾ > Global Payroll & Absence Mgmt ▾ > Payee Data ▾ > Maintain Absences ▾ > Absence Event

Buttons: Absence Event Entry Forecast Messages

Employee ID EMP00000030 Empl Record 0 Name EDGAR POE

From 11/10/2016 Through 05/09/2017 Refresh Forecast

Absence Events ? Personalize Find View All First

*Absence Take	Description	*Begin Date	End Date	Partial Hours	*Process Action	Voided	Original Begin Date	Details	Entry Source	Workflow Status
VAC TAKE ELEM	Vacation	02/13/2017	02/13/2017		Normal	<input type="checkbox"/>	02/13/2017	Details	Manager Timesheet	Saved
SDP TAKE ELEM	VSDP Sick Leave	01/23/2017	01/27/2017		Normal	<input type="checkbox"/>	01/23/2017	Details	Employee Timesheet	Approved
FML TAKE ELEM	Family and Medical Leave	01/23/2017	01/31/2017		Normal	<input type="checkbox"/>	01/23/2017	Details	Administrator Absence Event	Submitted
VAC TAKE ELEM	Vacation	01/18/2017	01/18/2017		Normal	<input type="checkbox"/>	01/18/2017	Details	Employee Timesheet	Cancelled
VAC TAKE ELEM	Vacation	01/10/2017	01/10/2017		Normal	<input type="checkbox"/>	01/10/2017	Details	Employee Timesheet	Submitted

Buttons: Save Return to Search Notify Refresh

Absence Event Entry | Forecast Messages



# Absence Event Tabs

The **Absence Events** section displays all absence requests and events entered in Cardinal for an employee, regardless of the entry source or workflow status.

There are three tabs in this section:

- **Absence Take**
- **Process Status**
- **Forecast Value**

Favorites ▾Main Menu ▾ > Global Payroll & Absence Mgmt ▾ > Payee Data ▾ > Maintain Absences ▾ > Absence Event

New Window | Help | Personalize Page |

Absence Event EntryForecast Messages

Employee ID EMP00000030Empl Record 0Name EDGAR POE

From 11/10/2016Through 05/09/2017RefreshForecast

Absence Events ?

Personalize | Find | View All | First 1

Absence TakeProcess StatusForecast Value

*Absence Take	Description	*Begin Date	End Date	Partial Hours	*Process Action	Voided	Original Begin Date	Details	Entry Source	Workflow Status
VAC TAKE ELEM	Vacation	02/13/2017	02/13/2017		Normal		02/13/2017	Details	Manager Timesheet	Saved
SDP TAKE ELEM	VSDP Sick Leave	01/23/2017	01/27/2017		Normal		01/23/2017	Details	Employee Timesheet	Approved
FML TAKE ELEM	Family and Medical Leave	01/23/2017	01/31/2017		Normal		01/23/2017	Details	Administrator Absence Event	Submitted
VAC TAKE ELEM	Vacation	01/18/2017	01/18/2017		Normal		01/18/2017	Details	Employee Timesheet	Cancelled
VAC TAKE ELEM	Vacation	01/10/2017	01/10/2017		Normal		01/10/2017	Details	Employee Timesheet	Submitted

SaveReturn to SearchNotifyRefresh

Absence Event Entry | Forecast Messages



# Select the Absence Take Tab to Review the Absence Event Page

The **Absence Take** tab includes the following fields:

- **Absence Take Element** - Type of absence
- **Description** - Description of the specific absence type
- **Begin Date** - Start date of the absence
- **End Date** - End date of the absence
- **Partial Hours** - Hours or partial hours taken that day
- **Process Action** - Options are **Normal** and **Void** (can be used to void or cancel an absence request)
- **Void**: An absence voided by an Absence Management Administrator – this box will be checked when the voided absence has been processed by the Calculate Absence and Payroll process
- **Original Begin Date** - This date should always be the same as **Begin Date** and will default when you enter the **Begin Date**
- **Details** - Link to the **Absence Event Input Detail** page to view additional details about prior absence requests and events or enter details about a new absence request
- **Entry Source** - The last source of entry or modification of the absence, e.g., timesheet
- **Workflow Status** - The current status of the absence request (such as saved, submitted, approved, cancelled, or voided)
- **[+]** - Add a row button
- **[-]** - Delete a row button





# Reviewing the Absence Event Page Status Data

The **Process Status** tab displays the status of the absence event as it relates to processing. Valid values in the **Status** field include **Not Processed**, **Processed**, and **Finalized**.

When an absence event from a prior pay period is modified in the current pay period, the **Status** field value of **Finalized** changes to **Not Processed**. For a newly entered absence, the **Status** field is also **Not Processed**. The **Status** field changes to **Processed** during the current calendar processing. All changes become a status of **Finalized** when the current Calendar ID period is finalized.

Favorites ▾Main Menu ▾ > Global Payroll & Absence Mgmt ▾ > Payee Data ▾ > Maintain Absences ▾ > Absence Event

Absence Event EntryForecast Messages

Employee ID EMP00000029Empl Record 0Name GEORGE PATTON  
From 11/10/2016 31Through 05/09/2017 31RefreshForecast

Absence Events ?

Personalize | Find | View All | 1-4 of 4 | First 1-4 of 4 Last

Absence TakeProcess StatusForecast Value

*Absence Take	Description	*Begin Date	End Date	Status	Calendar Group ID	Process Date		
VAC TAKE ELEM	Vacation	02/13/2017 31	02/13/2017 31	Not Processed			+	-
SDP TAKE ELEM	VSDP Sick Leave	01/26/2017 31	01/26/2017 31	Not Processed			+	-
VAC TAKE ELEM	Vacation	01/13/2017 31	01/13/2017 31	Not Processed			+	-
VAC TAKE ELEM	Vacation	01/12/2017 31	01/12/2017 31	Not Processed			+	-

SaveReturn to SearchNotifyRefresh

Absence Event Entry | Forecast Messages

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# Select the Forecast Value Tab to Review Forecast Value Page Status Data

The **Forecast Value** tab identifies employees that are either **Eligible** or **Ineligible**.

After entering an absence request, click the **Forecast** button. A pop-up message indicates when this process is complete. Click the **OK** button and then click the **Forecast Value** tab to view the results.

Click the **Forecast Details** link to open the **Absence Forecast Results** page.

Navigation: Favorites ▾ | **Main Menu ▾** > Global Payroll & Absence Mgmt ▾ > Payee Data ▾ > Maintain Absences ▾ > Absence Event

Buttons: Absence Event Entry | Forecast Messages

Employee ID: EMP00000029    Empl Record: 0    Name: GEORGE PATTON

From: 11/10/2016 [BT]    Through: 05/09/2017 [BT]    Refresh    Forecast

**Absence Events** ?    Personalize | Find | View All | [Print] [Grid]    First 1-4 of 4 Last

Sub-tabs: Absence Take | Process Status | **Forecast Value** [Filter]

*Absence Take	Description	*Begin Date	End Date	Forecast Value	Forecast Date Time	Forecast Details
VAC TAKE ELEM [Q]	Vacation	02/13/2017 [BT]	02/13/2017 [BT]	ELIGIBLE	02/07/2017 10:41AM	Forecast Details [+] [-]
SDP TAKE ELEM [Q]	VSDP Sick Leave	01/26/2017 [BT]	01/26/2017 [BT]	ELIGIBLE	02/07/2017 10:41AM	Forecast Details [+] [-]
VAC TAKE ELEM [Q]	Vacation	01/13/2017 [BT]	01/13/2017 [BT]	ELIGIBLE	02/07/2017 10:41AM	Forecast Details [+] [-]
VAC TAKE ELEM [Q]	Vacation	01/12/2017 [BT]	01/12/2017 [BT]	ELIGIBLE	01/09/2017 1:54PM	Forecast Details [+] [-]

Buttons: Save | Return to Search | Notify | Refresh

Absence Event Entry | Forecast Messages



# Absence Forecast Results

The **Absence Forecast Results** page displays the expected remaining balance, paid hours, and unpaid hours for an absence event.

This page helpful in quickly determining eligible and ineligible leave in the **Forecast Value** field.

In the example below, the employee is eligible to be paid for the full vacation absence of 8 hours. VAC FORECAST PAID shows that 8 hours will be paid, VAC FORECAST UNPD shows that 0 hours will be unpaid, and the remaining VACATION balance on that day is expected to be 20 hours (VAC ENT ELEM\_BAL) after the 8 hour take is deducted.

Click the **Return** button to return back to the **Forecast Value** tab.

Absence Forecast Results

Help

Absence Event

Absence Forecast Results

Absence Take Element VAC TAKE ELEM

Begin Date 02/15/2017

Absence Type Vacation

End Date 02/15/2017

Forecast Value ELIGIBLE

Forecast Date Time 03/28/2017 1:43PM

Absence Forecast Result Details

Personalize | Find | View All | [Grid Icon] | [Print Icon]

First 1-3 of 3 Last

Forecast Results

Accumulator Results

User Keys 1-3

User Keys 4-6

[Filter Icon]

Secondary Element	Forecast Element	Type	Numeric Value	Character Value	Date Value
VAC TAKE ELEM	VAC ENT ELEM_BAL	Accumulatr	20.000000		
VAC TAKE ELEM	VAC FORECAST PAID	Accumulatr	8.000000		
VAC TAKE ELEM	VAC FORECAST UNPD	Accumulatr	0.000000		

Return



# Entering Absences

To enter an absence for an employee, go to the **Absence Event** page using the following path:

**Cardinal FIN > Cardinal HCM > Main Menu > Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > Absence Event**

The user can enter, edit, or delete an absence event on behalf of an employee when an employee, timekeeper, or supervisor cannot make the change.

**Note: This page should only be used when the employee, Timekeeper, or Supervisor cannot make the change on the timesheet. And for some cases the entering of extended leave types that are not available on the timesheet because there is an administrator approval process outside of Cardinal (i.e. extended leave that requires paperwork, HR approval, etc. before it can be used).**

Enter the Search Criteria such as **Empl ID** or **Name** to select the employee.

An absence event must be entered and/or modified one employee at a time.

**Absence Event**

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

**Search Criteria**

Empl ID begins with ▾

Empl Record = ▾

Name begins with ▾

Last Name begins with ▾

Second Last Name begins with ▾

Alternate Character Name begins with ▾

Middle Name begins with ▾

☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)



# Entering Absences (continued)

To enter a new absence request, ensure the **Absence Take** tab is displayed.

- Click the plus icon (+) to the left of the bottom row to add a new row.
- A new, blank row displays.
- Click the **Details** link on the new row to go to the **Absence Event Input Detail** page.

Navigation: Favorites ▾ Main Menu ▾ > Global Payroll & Absence Mgmt ▾ > Payee Data ▾ > Maintain Absences ▾ > Absence Event

Buttons: New Window | Help | Personalize

Tabs: Absence Event Entry | Forecast Messages

Employee ID: EMP00000029    Empl Record: 0    Name: GEORGE PATTON

From: 11/12/2016    Through: 05/11/2017    Refresh    Forecast

Absence Events ?    Personalize | Find | View All | 1-5 of 5    First    Last

**Absence Take** | Process Status | Forecast Value

*Absence Take	Description	*Begin Date	End Date	Partial Hours	*Process Action	Voided	Original Begin Date	Details	Entry Source	Workflow Status	
VAC TAKE ELEM	Vacation	02/13/2017	02/13/2017		Normal	<input type="checkbox"/>	02/13/2017	Details	Manager Timesheet	Saved	+ -
SDP TAKE ELEM	VSDP Sick Leave	01/26/2017	01/26/2017		Normal	<input type="checkbox"/>	01/26/2017	Details	Employee Timesheet	Submitted	+ -
VAC TAKE ELEM	Vacation	01/13/2017	01/13/2017		Normal	<input type="checkbox"/>	01/13/2017	Details	Employee Timesheet	Submitted	+ -
VAC TAKE ELEM	Vacation	01/12/2017	01/12/2017		Normal	<input type="checkbox"/>	01/12/2017	Details	Employee Timesheet	Cancelled	+ -
					Normal	<input type="checkbox"/>		Details	Administrator Absence Event		+ -

Buttons: Save    Return to Search    Previous in List    Next in List    Notify    Refresh

Absence Event Entry | Forecast Messages



# Entering Absences (continued)

Enter the following values on this page:

- **Absence Take** - Absence type
- **Absence Reason** - Select the appropriate reason. **Note: Absence Reason is not required. However, it is very important that a reason always be entered for some calculations and tracking to work properly.**
- **Process Action** - Normal, Void
- **Begin Date**
- **End Date**
- **Original Begin Date** - Should be left blank. This will populate once the absence has been saved.
- **Partial Days** field - Enter a value if any of the days on the absence are less than a full day. After a value is entered into the **Partial Days** field, additional fields display that must also be completed.
- Do not use the **All Days Are Half Days** checkbox.

The screenshot shows the 'Absence Event Input Detail' form. Red boxes highlight the following fields:

- Absence Take**: VAC TAKE ELEM
- Absence Reason**: VAC (with a dropdown arrow)
- \*Process Action**: Normal (with a dropdown arrow)
- \*Begin Date**: 02/13/2017
- End Date**: 02/17/2017
- Original Begin Date**: (empty)
- Partial Days**: None (with a dropdown arrow)

Other visible fields include:

- Absence Type**: Vacation
- Event Priority**: 90
- Last Updated**: (empty)
- Process Status**: Not Processed
- Calendar Group ID**: (empty)
- Process Date**: (empty)
- First Processed Date**: (empty)
- Entry Source**: Administrator Absence Event
- Workflow Status**: Approved
- Voided Indicator**: (checkbox, unchecked)
- Manager Approved**: (checkbox, checked)

The form also includes sections for **User Defined Fields** (1, 2, 3, and 4), each with fields for Date, Character, Monetary, and Decimal values, along with Currency selection.



# Entering Absences (continued)

If any of the days on the absence are less than a full day, click the drop-down option in the **Partial Days** field. After an option is selected, additional fields display based on the selection.

In this example, the **Start Day Only** option was selected. Two fields display:

- **Start Day Hours**
- **Start Day is Half Day**

Enter the hours in the **Start Day Hours** field.

Note: Do not use the **Start Day is Half Day** or **End Day is Half Day** checkbox option for any of the partial day selections. Always enter the actual partial day hours.

The screenshot shows the 'Absence Begin / End Data' form. The 'Partial Days' dropdown menu is open, displaying the following options: 'All Days', 'End Day Only', 'None', 'Start Day Only' (highlighted in blue), and 'Start and End Days'. The 'Original Begin Date' field is also visible.

The screenshot shows the 'Absence Begin / End Data' form with the 'Partial Days' dropdown set to 'Start Day Only'. The 'Start Day Hours' field is highlighted with a red box, and the 'Start Day is Half Day' checkbox is visible to its right.



# Entering Absences (continued)

Once entry is completed, a comment can be entered as necessary by clicking the **Comments** link at the bottom of the page.

Once the necessary fields are completed, click the **OK** button to return to the **Absence Event** page.

Absence Event

Absence Event Input Detail

Absence TakeVAC TAKE ELEM

Absence ReasonVACVacation

Entry SourceAdministrator Absence Event

Workflow StatusApproved

\*Process ActionNormal

☐ Voided Indicator

☒ Manager Approved

Absence TypeVacation

Event Priority90

Last Updated

Process StatusNot Processed

Calendar Group ID

Process Date

First Processed Date

Absence Begin / End Data

\*Begin Date02/13/2017

End Date02/17/2017

Original Begin Date02/13/2017

Partial DaysNone

User Defined Fields

User Defined Fields 1

Date 1

Character 1

Monetary 1

Decimal 1

Currency 1

User Defined Fields 2

Date 2

Character 2

Monetary 2

Decimal 2

Currency 2

User Defined Fields 3

Date 3

Character 3

Monetary 3

Decimal 3

Currency 3

User Defined Fields 4

Date 4

Character 4

Monetary 4

Decimal 4

Currency 4

Override

Entitlement

Adjustment

Comments

OK

Cancel

Refresh





# Forecasting the Absence Request

When a row is initially added, the **Workflow Status** field defaults to **Saved**.

After entering the necessary field values for the absence request, click the **Forecast** button.

The absence types that require forecasting are those that require a sufficient balance to be used (whether earned like vacation or adjusted/granted ad hoc like employee recognition leave).

Absence types that do not require forecasting are those that are used as needed without the need for sufficient balance, such as administrative leave (jury duty, etc.).

Navigation: Favorites > Main Menu > Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > Absence Event

Employee ID: EMP00000029    Empl Record: 0    Name: GEORGE PATTON

From: 11/15/2016    Through: 05/14/2017    Refresh    **Forecast**

Absence Events ?    Personalize | Find | View All | First 1-5 of 5 Last

Absence Take	Description	*Begin Date	End Date	Partial Hours	*Process Action	Voided	Original Begin Date	Details	Entry Source	Workflow Status
VAC TAKE ELEM	Vacation	02/13/2017	02/13/2017		Normal	<input type="checkbox"/>	02/13/2017	Details	Manager Timesheet	<b>Saved</b>
SDP TAKE ELEM	VSDP Sick Leave	01/26/2017	01/26/2017		Normal	<input type="checkbox"/>	01/26/2017	Details	Employee Timesheet	Submitted
VAC TAKE ELEM	Vacation	01/13/2017	01/13/2017		Normal	<input type="checkbox"/>	01/13/2017	Details	Employee Timesheet	Submitted
VAC TAKE ELEM	Vacation	01/12/2017	01/12/2017		Normal	<input type="checkbox"/>	01/12/2017	Details	Employee Timesheet	Cancelled
VAC TAKE ELEM	Vacation	02/13/2017	02/17/2017		Normal	<input type="checkbox"/>	02/13/2017	Details	Administrator Absence Event	Approved

Save    Return to Search    Notify    Refresh

Absence Event Entry | Forecast Messages

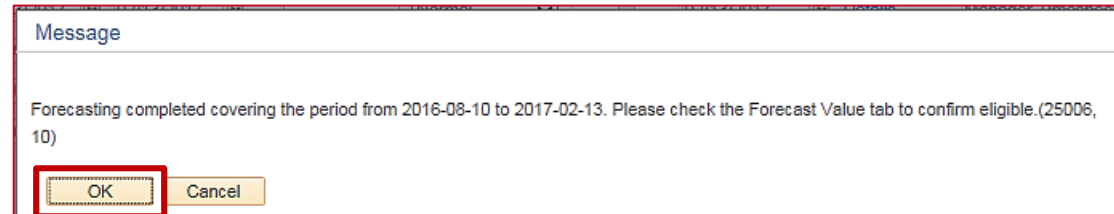


# Forecasting the Absence Request (continued)

Most absence requests entered on behalf of another employee are auto-approved and will be processed on the next run of the Calculate Absence and Payroll process.

The Absence request types that are not auto-approved are those that require a second level of approval per VDOT business process (mostly extended leave types such as FML, STD, WCL, etc.). The reason for this is to have a second set of eyes on it so that both HR and Payroll validate the extended leave entries are correct and have the appropriate approval outside of Cardinal (paperwork submitted, employee has met hours worked requirements, etc.). See slide 59.

If the forecast is successful, a pop-up box displays:



Click the **OK** button.



# Forecasting the Absence Request (continued)

The **Workflow Status** has changed to **Approved**.

Click the **Forecast Value** tab to confirm the employee is eligible.

Absence Event EntryForecast Messages

New Window | Help | Personalize Page

Employee ID EMP00000029Empl Record 0Name GEORGE PATTON

From 11/15/2016Through 05/14/2017RefreshForecast

Absence Events ?

Personalize | Find | View All | First 1-4 of 4 Last

Absence TakeProcess StatusForecast Value

*Absence Take	Description	*Begin Date	End Date	Partial Hours	*Process Action	Voided	Original Begin Date	Details	Entry Source	Workflow Status
SDP TAKE ELEM	VSDP Sick Leave	01/26/2017	01/26/2017		Normal		01/26/2017	Details	Employee Timesheet	Submitted
VAC TAKE ELEM	Vacation	01/13/2017	01/13/2017		Normal		01/13/2017	Details	Employee Timesheet	Submitted
VAC TAKE ELEM	Vacation	01/12/2017	01/12/2017		Normal		01/12/2017	Details	Employee Timesheet	Cancelled
VAC TAKE ELEM	Vacation	02/15/2017	02/15/2017		Normal		02/15/2017	Details	Administrator Absence Event	Approved

SaveReturn to SearchNotifyRefresh

Absence Event Entry | Forecast Messages



# Forecast Value Eligible

For this example the **Forecast Value** is **ELIGIBLE**.

Absence Event EntryForecast Messages

Employee ID EMP00000029Empl Record 0Name GEORGE PATTON

From 11/15/2016Through 05/14/2017RefreshForecast

Absence Events

PersonalizeFindView AllFirst1-4 of 4Last

Absence TakeProcess StatusForecast Value

*Absence Take	Description	*Begin Date	End Date	Forecast Value	Forecast Date Time	Forecast Details
SDP TAKE ELEM	VSDP Sick Leave	01/26/2017	01/26/2017	ELIGIBLE	02/13/2017 4:09PM	Forecast Details
VAC TAKE ELEM	Vacation	01/13/2017	01/13/2017	ELIGIBLE	02/13/2017 4:09PM	Forecast Details
VAC TAKE ELEM	Vacation	01/12/2017	01/12/2017	ELIGIBLE	01/09/2017 1:54PM	Forecast Details
VAC TAKE ELEM	Vacation	02/15/2017	02/15/2017			Forecast Details

SaveReturn to SearchNotifyRefresh

Absence Event EntryForecast Messages



# Forecast Value Ineligible

Cardinal automatically generates Leave Without Pay (LNP) if the absence entered does not have a sufficient absence entitlement balance. No notification is generated when this occurs and the LNP does not display on the **Absence Event** page.

When the **Forecast Value** is **INELIGIBLE**, the employee does not have enough of that specific leave type to cover the absence.

Click the **Forecast Details** link.

Favorites > Main Menu > Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > Absence Event

Absence Event Entry

Forecast Messages

Employee ID EMP00000028    Empl Record 0    Name ROSA PARKS

From 11/15/2016    Through 05/14/2017    Refresh    Forecast

Absence Events

Personalize | Find | View All | 1-4 of 4 | First | Last

Absence Take

Process Status

Forecast Value

*Absence Take	Description	*Begin Date	End Date	Forecast Value	Forecast Date Time	Forecast Details	
VAC TAKE ELEM	Vacation	02/13/2017	02/13/2017	INELIGIBLE	02/13/2017 4:27PM	Forecast Details	+ -
VAC TAKE ELEM	Vacation	02/06/2017	02/10/2017	INELIGIBLE	02/13/2017 4:27PM	Forecast Details	+ -
VAC TAKE ELEM	Vacation	01/20/2017	01/20/2017	ELIGIBLE	02/13/2017 4:27PM	Forecast Details	+ -
VAC TAKE ELEM	Vacation	12/16/2016	12/16/2016	ELIGIBLE	01/31/2017 3:15PM	Forecast Details	+ -

Save

Return to Search

Notify

Refresh

Absence Event Entry | Forecast Messages



# Forecast Value Ineligible (continued)

The **Absence Forecast Results** page displays. In this example, the employee does not have enough VSDP (Virginia Sickness and Disability Program) sick leave. If this is processed, it shows the employee will have 8 hours of unpaid leave.

**It is the Administrator's responsibility to verify the employee has sufficient balance to cover the absence if a balance is required for the absence type.**

If the employee's leave balance is insufficient, work with the employee and/or supervisor to determine if another leave type can be used. The employee and/or supervisor should be given an opportunity to update the leave request whenever possible, to avoid going on leave without pay.

Click the **Return** button to go back to the **Forecast Value** tab.

Absence Forecast Results

Absence Event

Absence Forecast Results

Absence Take Element VAC TAKE ELEM

Absence Type Vacation

Forecast Value INELIGIBLE

Begin Date 02/13/2017

End Date 02/13/2017

Forecast Date Time 02/13/2017 4:27PM

Absence Forecast Result Details

Forecast Results

Accumulator Results

User Keys 1-3

User Keys 4-6

Secondary Element	Forecast Element	Type	Numeric Value	Character Value	Date Value
VAC TAKE ELEM	VAC ENT ELEM_BAL	Accumulatr	0.000000		
VAC TAKE ELEM	VAC FORECAST PAID	Accumulatr	0.000000		
VAC TAKE ELEM	VAC FORECAST UNPD	Accumulatr	8.000000		

Return



# Saving the Absence Request

After confirming the employee is eligible for the leave, click the **Save** button.

Absence Event EntryForecast Messages

Employee ID EMP00000029Empl Record 0Name GEORGE PATTON

From 11/15/2016Through 05/14/2017RefreshForecast

Absence Events

PersonalizeFindView AllFirst1-4 of 4Last

Absence TakeProcess StatusForecast Value

*Absence Take	Description	*Begin Date	End Date	Forecast Value	Forecast Date Time	Forecast Details		
SDP TAKE ELEM	VSDP Sick Leave	01/26/2017	01/26/2017	ELIGIBLE	02/13/2017 4:09PM	Forecast Details	+	-
VAC TAKE ELEM	Vacation	01/13/2017	01/13/2017	ELIGIBLE	02/13/2017 4:09PM	Forecast Details	+	-
VAC TAKE ELEM	Vacation	01/12/2017	01/12/2017	ELIGIBLE	01/09/2017 1:54PM	Forecast Details	+	-
VAC TAKE ELEM	Vacation	02/15/2017	02/15/2017			Forecast Details	+	-

Save

Return to Search

Notify

Refresh

Absence Event EntryForecast Messages



# Modifying an Absence Request and Event

- To edit an existing absence event, click the **Details** link associated with the absence that needs to be modified.
- Make the necessary changes on the **Absence Event Input Detail** page and then click the **OK** button.
- When the **Absence Event** page displays, click the **Save** button.

The screenshot shows the 'Absence Event' page for employee SANDRA O'CONNOR. It displays a table of absence events with columns: \*Absence Take, Description, \*Begin Date, End Date, Partial Hours, \*Process Action, Voided, Original Begin Date, Details, Entry Source, and Workflow Status. The 'PER TAKE ELEM' row is highlighted, and its 'Details' link is circled in red. Below the table are buttons for Save, Return to Search, Notify, and Refresh.

*Absence Take	Description	*Begin Date	End Date	Partial Hours	*Process Action	Voided	Original Begin Date	Details	Entry Source	Workflow Status
CSL TAKE ELEM	Volunteer Service Leave	01/20/2017	01/20/2017		Normal	<input type="checkbox"/>	01/20/2017	Details	Employee Timesheet	Approved
SDP TAKE ELEM	VSDP Sick Leave	01/17/2017	01/17/2017		Normal	<input type="checkbox"/>	01/17/2017	Details	Manager Timesheet	Approved
PER TAKE ELEM	VSDP Personal Leave	01/09/2017	01/09/2017		Normal	<input type="checkbox"/>	01/09/2017	Details	Employee Timesheet	Denied
VAC TAKE ELEM	Vacation	01/04/2017	01/04/2017		Normal	<input type="checkbox"/>	01/04/2017	Details	Employee Timesheet	Saved
SDP TAKE ELEM	VSDP Sick Leave	12/12/2016	12/12/2016		Normal	<input type="checkbox"/>	12/12/2016	Details	Employee Timesheet	Saved

The screenshot shows the 'Absence Event Input Detail' page. It contains fields for Absence Take (PER TAKE ELEM), Absence Reason (PER), Entry Source (Employee Timesheet), Workflow Status (Denied), \*Process Action (Normal), and various dates. There are also checkboxes for Voided Indicator and Manager Approved. Below these are sections for User Defined Fields 1, 2, 3, and 4, each with fields for Date, Character, Monetary, and Decimal.

**Absence Event**  
**Absence Event Input Detail**

Absence Take: PER TAKE ELEM  
Absence Reason: PER VSDP Personal Leave  
Entry Source: Employee Timesheet  
Workflow Status: Denied  
\*Process Action: Normal  
Voided Indicator: ☐  
Manager Approved: ☐

Absence Type: VSDP Personal Leave  
Event Priority: 0  
Last Updated: 01/24/2017  
Process Status: Not Processed  
Calendar Group ID:  
Process Date:  
First Processed Date:

**Absence Begin / End Data**

\*Begin Date: 01/09/2017  
End Date: 01/09/2017  
Original Begin Date: 01/09/2017  
Partial Days: None

**User Defined Fields**

**User Defined Fields 1**  
Date 1:   
Character 1:   
Monetary 1:   
Decimal 1:   
Currency 1:

**User Defined Fields 2**  
Date 2:   
Character 2:   
Monetary 2:   
Decimal 2:   
Currency 2:

**User Defined Fields 3**  
**User Defined Fields 4**





# Modifying an Absence Request and Event (continued)

Favorites ▾Main Menu ▾ > Global Payroll & Absence Mgmt ▾ > Payee Data ▾ > Maintain Absences ▾ > Absence Event

New Window | Help | Personalize Pa

Absence Event EntryForecast Messages

Employee ID EMP00000027Empl Record 0Name SANDRA OCONNOR

From 11/17/2016Through 05/16/2017RefreshForecast

Absence Events ?Personalize | Find | View All | First

Absence TakeProcess StatusForecast Value

*Absence Take	Description	*Begin Date	End Date	Partial Hours	*Process Action	Voided	Original Begin Date	Details	Entry Source	Workflow Status
CSL TAKE ELEM	Volunteer Service Leave	01/20/2017	01/20/2017		Normal		01/20/2017	Details	Employee Timesheet	Approved
SDP TAKE ELEM	VSDP Sick Leave	01/17/2017	01/17/2017		Normal		01/17/2017	Details	Manager Timesheet	Approved
PER TAKE ELEM	VSDP Personal Leave	01/09/2017	01/09/2017		Normal		01/09/2017	Details	Employee Timesheet	Denied
VAC TAKE ELEM	Vacation	01/04/2017	01/04/2017		Normal		01/04/2017	Details	Employee Timesheet	Saved
SDP TAKE ELEM	VSDP Sick Leave	12/12/2016	12/12/2016		Normal		12/12/2016	Details	Employee Timesheet	Saved

SaveReturn to SearchNotifyRefresh

Absence Event Entry | Forecast Messages



# Modifying an Absence Request and Event (continued)

Absence Event Input Detail

Help

Absence Event

Absence Event Input Detail

Absence Take

PER TAKE ELEM

x

Absence Reason

PER

VSDP Personal Leave

Entry Source

Employee Timesheet

Workflow Status

Denied

\*Process Action

Normal

Voided Indicator

Manager Approved

Absence Type

VSDP Personal Leave

Event Priority

0

Last Updated

01/24/2017

Process Status

Not Processed

Calendar Group ID

Process Date

First Processed Date

Absence Begin / End Data

\*Begin Date

01/09/2017

End Date

01/09/2017

Original Begin Date

01/09/2017

Partial Days

None

User Defined Fields

User Defined Fields 1

Date 1

Character 1

Monetary 1

Decimal 1

Currency 1

User Defined Fields 2

Date 2

Character 2

Monetary 2

Decimal 2

Currency 2

User Defined Fields 3

Date 3

Character 3

Monetary 3

Decimal 3

Currency 3

User Defined Fields 4

Date 4

Character 4

Monetary 4

Decimal 4

Currency 4

Override

Entitlement

Adjustment

Comments

OK

Cancel

Refresh

# Deleting an Absence Request and Event

Deleting an absence request or event means the absence is completely removed from Cardinal and leaves no record of the request or event. Delete an absence request or event by clicking on the minus (-) icon. The minus icon is available if the absence has not yet been processed by the Calculate Absence and Payroll process.

A confirmation message displays to confirm the deletion. Once confirmed, the absence request or event is removed. Click the **Save** button in order for the deletion to be processed and updated.

Favorites ▾

Main Menu ▾

Global Payroll & Absence Mgmt ▾

Payee Data ▾

Maintain Absences ▾

Absence Event

Absence Event Entry

Forecast Messages

Employee ID EMP00000027

Empl Record 0

Name SANDRA OCONNOR

From 11/17/2016

Through 05/16/2017

Refresh

Forecast

Absence Events ?

Personalize | Find | View All | 1-5 of 5 | Last

Absence Take

Process Status

Forecast Value

*Absence Take	Description	*Begin Date	End Date	Partial Hours	*Process Action	Voided	Original Begin Date	Details	Entry Source	Workflow Status	
CSL TAKE ELEM	Volunteer Service Leave	01/20/2017	01/20/2017		Normal ▾	<input type="checkbox"/>	01/20/2017	Details	Employee Timesheet	Approved	<div>+ -</div>
SDP TAKE ELEM	VSDP Sick Leave	01/17/2017	01/17/2017		Normal ▾	<input type="checkbox"/>	01/17/2017	Details	Manager Timesheet	Approved	<div>+ -</div>
PER TAKE ELEM	VSDP Personal Leave	01/09/2017	01/09/2017		Normal ▾	<input type="checkbox"/>	01/09/2017	Details	Employee Timesheet	Denied	<div>+ -</div>
VAC TAKE ELEM	Vacation	01/04/2017	01/04/2017		Normal ▾	<input type="checkbox"/>	01/04/2017	Details	Employee Timesheet	Saved	<div>+ -</div>
SDP TAKE ELEM	VSDP Sick Leave	12/12/2016	12/12/2016		Normal ▾	<input type="checkbox"/>	12/12/2016	Details	Employee Timesheet	Saved	<div>+ -</div>

Save

Return to Search

Notify

Refresh

Absence Event Entry | Forecast Messages



# Voiding an Absence Request or Event

Voiding an absence cancels the absence request or event. If the absence was already deducted from the balance, the hours will be added back after the next run of the Calculate Absence and Payroll process.

To void an absence request or event, click in the **Process Action** field and select **Void** from the drop-down list. Click the **Save** button. The **Workflow Status** field will change to **Voided**.

If the absence was originally entered on the **Timesheet** page and not yet approved, the appropriate process action in this case would be to have the employee, timekeeper, or manager cancel the absence on the timesheet. If that cannot be done, the administrator can void the request.

When an absence is voided, a record of the request or event remains in Cardinal and the **Void** field will be checked after the next run of the Calculate Absence and Payroll process.

FavoritesMain MenuGlobal Payroll & Absence MgmtPayee DataMaintain AbsencesAbsence Event

Absence Event EntryForecast Messages

Employee ID EMP00000027Empl Record 0Name SANDRA OCONNOR

From 11/17/2016Through 05/16/2017RefreshForecast

Absence Events

PersonalizeFindView All1-5 of 5Last

*Absence Take	Description	*Begin Date	End Date	Partial Hours	*Process Action	Voided	Original Begin Date	Details	Entry Source	Workflow Status
CSL TAKE ELEM	Volunteer Service Leave	01/20/2017	01/20/2017		Normal Void	<input type="checkbox"/>	01/20/2017	Details	Employee Timesheet	Approved
SDP TAKE ELEM	VSDP Sick Leave	01/17/2017	01/17/2017		Normal	<input type="checkbox"/>	01/17/2017	Details	Manager Timesheet	Approved
PER TAKE ELEM	VSDP Personal Leave	01/09/2017	01/09/2017		Normal	<input type="checkbox"/>	01/09/2017	Details	Employee Timesheet	Denied
VAC TAKE ELEM	Vacation	01/04/2017	01/04/2017		Normal	<input type="checkbox"/>	01/04/2017	Details	Employee Timesheet	Saved
SDP TAKE ELEM	VSDP Sick Leave	12/12/2016	12/12/2016		Normal	<input type="checkbox"/>	12/12/2016	Details	Employee Timesheet	Saved

Save

Return to Search

Notify

Refresh

Absence Event EntryForecast Messages



# Voiding an Absence Request or Event (continued)

Favorites ▾ Main Menu ▾ > Global Payroll & Absence Mgmt ▾ > Payee Data ▾ > Maintain Absences ▾ > Absence Event New Window | Help | Personalize Page

Absence Event Entry | Forecast Messages

Employee ID EMP00000027 Empl Record 0 Name SANDRA OCONNOR

From 11/17/2016 Through 05/16/2017 Refresh Forecast

**Absence Events** Personalize | Find | View All | First 1-5 of 5 Last

Absence Take Process Status Forecast Value

*Absence Take	Description	*Begin Date	End Date	Partial Hours	*Process Action	Voided	Original Begin Date	Details	Entry Source	Workflow Status
CSL TAKE ELEM	Volunteer Service Leave	01/20/2017	01/20/2017		Normal Void	<input type="checkbox"/>	01/20/2017	Details	Employee Timesheet	Approved
SDP TAKE ELEM	VSDP Sick Leave	01/17/2017	01/17/2017		Normal	<input type="checkbox"/>	01/17/2017	Details	Manager Timesheet	Approved
PER TAKE ELEM	VSDP Personal Leave	01/09/2017	01/09/2017		Normal	<input type="checkbox"/>	01/09/2017	Details	Employee Timesheet	Denied
VAC TAKE ELEM	Vacation	01/04/2017	01/04/2017		Normal	<input type="checkbox"/>	01/04/2017	Details	Employee Timesheet	Saved
SDP TAKE ELEM	VSDP Sick Leave	12/12/2016	12/12/2016		Normal	<input type="checkbox"/>	12/12/2016	Details	Employee Timesheet	Saved

**Save** Return to Search Notify Refresh

Absence Event Entry | Forecast Messages

Favorites ▾ Main Menu ▾ > Global Payroll & Absence Mgmt ▾ > Payee Data ▾ > Maintain Absences ▾ > Absence Event New Window | Help | Personalize Page

Absence Event Entry | Forecast Messages

Employee ID EMP00000027 Empl Record 0 Name SANDRA OCONNOR

From 11/17/2016 Through 05/16/2017 Refresh Forecast

**Absence Events** Personalize | Find | View All | First 1-5 of 5 Last

Absence Take Process Status Forecast Value

*Absence Take	Description	*Begin Date	End Date	Partial Hours	*Process Action	Voided	Original Begin Date	Details	Entry Source	Workflow Status
CSL TAKE ELEM	Volunteer Service Leave	01/20/2017	01/20/2017		Void	<input type="checkbox"/>	01/20/2017	Details	Administrator Absence Event	Voided
SDP TAKE ELEM	VSDP Sick Leave	01/17/2017	01/17/2017		Normal	<input type="checkbox"/>	01/17/2017	Details	Manager Timesheet	Approved
PER TAKE ELEM	VSDP Personal Leave	01/09/2017	01/09/2017		Normal	<input type="checkbox"/>	01/09/2017	Details	Employee Timesheet	Denied
SDP TAKE ELEM	VSDP Sick Leave	12/12/2016	12/12/2016		Normal	<input type="checkbox"/>	12/12/2016	Details	Employee Timesheet	Saved
VAC TAKE ELEM	Vacation	01/04/2017	01/04/2017		Normal	<input type="checkbox"/>	01/04/2017	Details	Employee Timesheet	Saved

**Save** Return to Search Notify Refresh

Absence Event Entry | Forecast Messages



# Deleting or Voiding an Absence

The recommendation for choosing whether to void or delete is as follows:

- If the absence event is for a planned future date, it can be deleted.
- If the absence is current or occurred in the past, it should be voided. This maintains a record of the request or event in case there are any issues that would need to be researched later.
- Cardinal automatically adjusts an employee's absence entitlement balance if the absence was previously deducted from the balance.



# Simulation: Entering and Modifying Absences

You will now view a simulation that demonstrates how to **Enter and Modify Absences**.





# Entering and Managing Extended Absences

Extended absences include:

- **FML:** Family Medical Leave
- **STD:** Short Term Disability
- **LTD:** Long Term Disability
- **WCL:** Worker's Compensation

Extended absences are entered and managed through the **Absence Event** page.

Navigate to the **Absence Event** page using the following path:

**Cardinal FIN > Cardinal HCM > Main Menu > Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > Absence Event**

Absence Events ?

Absence Take

Forecast Results

Select	*Start Date	End Date	Absence Name	Reason
<input type="checkbox"/>	02/13/2017	02/13/2017	Family and Medical	FMLA Employee

CARDINAL

All Search Advanced Search

Home Worklist Performance Trace Add to Favorites Sign out

Favorites Main Menu > Global Payroll & Absence Mgmt > Payee Data > Maintain Absences

Global Payroll & Absence Mgmt

**Maintain Absences**  
Contains pages for Absence Entry and Balances

**Absence Event**  
Add or update an absence event for a specified payee.

**Review Absence Balances**  
Review current and forecast absence balances for a payee.

**Assign Entitlements and Takes**  
Add or update an entitlement override or a take override for a payee.





# Entering and Managing Extended Absences (continued)

Several specific tasks are required when entering and managing an extended absence in Cardinal:

- Checking Absence Tracking Accumulators
- Entering Concurrent Absence Events
- Obtaining Approval



# Checking Absence Tracking Accumulators

Cardinal uses accumulators to track the hours or days of absence usage (accumulated time) based on pre-defined business rules. Before entering an extended absence request, review the accumulator values for the extended leave type(s) you plan to enter.

The accumulators used for the various extended absence types include:

- **FML** (Family Medical Leave) - Three tracking accumulators are used to track FML hours used.
  - The **FML ENT ELEM TAKE** accumulator tracks FML used in the leave year, regardless of absence reason (includes Employee, Family, and Military FML).
  - The **FML EMP/FAM BAL** accumulator tracks FML used in the leave year with an absence reason of **Employee** or **Family**.
  - The **FML MILITARY BAL** accumulator tracks FML used in the leave year with an absence reason of **Military**.
- **STD** (Short Term Disability) - The **STD TAKE BAL DAYS** accumulator tracks the total STD taken in the leave year in days rather than hours. It also includes holidays and weekends that fall during a consecutive Short Term Disability.
- **LTD** (Long Term Disability) - Similar to STD, the **LTD TAKE BAL DAYS** accumulator tracks the total LTD taken in the leave year in days rather than hours. It also includes holidays and weekends that fall during a consecutive Long Term Disability.
- **WCL** (Worker's Compensation Leave ) - The **WCL ENT ELEM TAKE** accumulator tracks the total WCL hours taken in the leave year.



# Extended Absences Used to Track Employee Usage and Validate Eligibility

Cardinal uses extended absences to track employee usage and validate eligibility. **WCL** (Worker's Compensation Leave), an extended absence, generates charge distributions to allocate salary costs. Some extended absences do not generate charge distributions to allocate salary costs:

- **STD** (Short Term Disability)
- **LTD** (Long Term Disability)

One extended absence, **FML** (Family Medical Leave), is used exclusively for tracking, validation, and reporting. **FML** (Family Medical Leave) runs concurrently with other absence types and eligibility is determined outside of Cardinal. **FML** does not generate pay, so you must **enter another absence take concurrent with the FML date range to generate pay** for the employee (e.g., **SCK** (Traditional Sick), **VAC** (Vacation), **CPT** (Compensatory Leave Taken). If an employee has no available balances, enter **LNP** (Leave Without Pay).

The screenshot displays the CARDINAL system interface for Absence Event Entry. The top navigation bar includes the CARDINAL logo, a search bar, and links for Home and Worklist. The breadcrumb trail shows: Favorites > Main Menu > Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > Absence Event. The main content area has tabs for Absence Event Entry and Forecast Messages. Below the tabs, the Employee ID is EMP00000028, Empl Record is 0, and Name is ROSA PARKS. The date range is set from 03/21/2017 to 03/30/2017, with Refresh and Forecast buttons. The Absence Events table is shown with columns: Absence Take, Description, \*Begin Date, End Date, Partial Hours, \*Process Action, Voided, Original Begin Date, Details, Entry Source, and Workflow Status. Two entries are listed: VAC TAKE ELEM (Vacation) and FML TAKE ELEM (Family and Medical Leave), both with dates 03/27/2017 to 03/31/2017. The VAC TAKE ELEM entry has a Workflow Status of Approved. The bottom of the screen has buttons for Save, Return to Search, Notify, and Refresh.

*Absence Take	Description	*Begin Date	End Date	Partial Hours	*Process Action	Voided	Original Begin Date	Details	Entry Source	Workflow Status
VAC TAKE ELEM	Vacation	03/27/2017	03/31/2017		Normal		03/27/2017	Details	Administrator Absence Event	Approved
FML TAKE ELEM	Family and Medical Leave	03/27/2017	03/31/2017		Normal		03/27/2017	Details	Administrator Absence Event	



# Managing Concurrent Extended Absence Events

Using **FML** does not affect the charge distributions that allocate salary costs. The absence types used concurrently with **FML** create the charge distributions that allocate salary costs. However, **FML** and other extended leaves will be visible on the employee's timesheet in Self Service.

If an extended absence, e.g., **FML** (Family Medical Leave), **STD** (Short Term Disability), **LTD** (Long Term Disability), **WCL** (Worker's Compensation Leave), is used concurrently with **CPT** (Compensatory Leave Taken) or **OTT** (Overtime Leave Taken), the **CPT** and **OTT** takes must be entered on the employee timesheet.

If the Administrator does not have access to the employee timesheet, they must coordinate the entry of **CPT** and/or **OTT** with someone who does have access, such as the Time and Labor Administrator.

Absence Event Entry

Forecast Messages

Employee ID 00278454300

Empl Record

Name BRYAN FERGUSON

From 12/23/2016

Through 06/21/2017

Refresh

Forecast

Absence Events

Personalize | Find | View All | First 1-3 of 3 Last

Absence Take

Process Status


Forecast Value



*Absence Take	Description	*Begin Date	End Date	Partial Hours	*Process Action	Voided	Original Begin Date	Details	Entry Source	Workflow Status
FML TAKE ELEM	Family and Medical Leave	02/25/2017	03/09/2017		Normal		02/25/2017	Details	Administrator Absence Event	Submitted
STD TAKE ELEM	VSDP Short Term Disability	02/25/2017	03/09/2017	6.40	Normal		02/25/2017	Details	Administrator Absence Event	Submitted
VAC TAKE ELEM	Vacation	02/25/2017	03/09/2017	1.60	Normal		02/25/2017	Details	Administrator Absence Event	Approved






# Managing Concurrent Extended Absence Events (continued)


Absence Event EntryForecast Messages



















Employee ID 00278454300Empl Record Name BRYAN FERGUSON

From 12/23/2016 Through 06/21/2017 RefreshForecast

Absence Events 

PersonalizeFindView All  First 1-3 of 3Last

Absence TakeProcess StatusForecast Value 

*Absence Take▲	Description	*Begin Date▼	End Date	Partial Hours	*Process Action	Voided	Original Begin Date	Details	Entry Source	Workflow Status		
FML TAKE ELEM 	Family and Medical Leave	02/25/2017 	03/09/2017 		Normal ▼	<input type="checkbox"/>	02/25/2017 	Details	Administrator Absence Event	Submitted		
STD TAKE ELEM 	VSDP Short Term Disability	02/25/2017 	03/09/2017 	6.40	Normal ▼	<input type="checkbox"/>	02/25/2017 	Details	Administrator Absence Event	Submitted		
VAC TAKE ELEM 	Vacation	02/25/2017 	03/09/2017 	1.60	Normal ▼	<input type="checkbox"/>	02/25/2017 	Details	Administrator Absence Event	Approved		



# Extended Absences – Special Considerations: Family and Medical Leave

Some extended absence types require unique handling when entering and managing the absence in Cardinal.

In order for the employee to take **FML** in Cardinal, the administrator must enter a balance adjustment to grant the employee hours.

It is critical to always enter an **Absence Reason** for an **FML** event (e.g., FML Employee, FML Family, FML Military) to ensure proper accumulator tracking.

FML is available for selection on the timesheet, but is typically only entered on the timesheet if the leave is intermittent rather than consecutive. If the FML is to be entered by the employee/approver/timekeeper on the timesheet, the Absence Management Administrator will still need to give the appropriate FML hours as a balance adjustment.



# Extended Absences – Special Considerations: Short Term Disability (STD)

Only the Absence Management Administrator can enter **STD** (Short Term Disability) on the **Absence Event** page.

**STD** may be entered on the same date with any other absence type, except for **VSDP Sick** (Virginia Sickness and Disability Program), to report scheduled hours that are not covered by Short Term Disability. If **STD** and **VSDP Sick** are entered on the same date, Cardinal displays an error message.

If the employee does not have sufficient balances of other absence types to cover the difference or chooses not to use paid leave, then **STL** (Short Term Leave Without Pay) take is used to indicate the unpaid time instead of the **LNP** (Leave without Pay) take. When you enter **STL**, the employee continues accruing vacation for the first 90 days of a Short Term Disability.

If the employee is working while on Short Term Disability, use **RSW** (Short Term Disability Working) for tracking purposes, rather than **RGS** (a Time Reporting Code used to classify hours recorded on a timesheet as Regular Earnings – Salaried).

Employees working under Short Term Disability are eligible for a specified percent of hours paid per scheduled work day. Difference refers to the amount of hours that the employee uses to supplement the Short Term Disability hours to total the employee's scheduled hours per day per employee.



# Extended Absences – Special Considerations: Long Term Disability (LTD)

Only the Absence Management Administrator can enter **LTD** (Long Term Disability) on the **Absence Event** page.

**Use RLW** (Long Term Disability Working ) rather than **RGS** (Regular Earnings – Salaried) to track hours worked by an employee on **LTD**.





# Extended Absences – Special Considerations: Worker's Compensation (WCL)

Only the Absence Management Administrator can enter **WCL** (Worker's Compensation Leave) on the **Absence Event** page.

Use **STL** (Short Term Leave) to report unpaid time instead of **LNP** (Leave Without Pay) when an employee is on Worker's Compensation Leave. This allows the employee to continue accruing vacation for the first 90 days of a Worker's Compensation Leave.

When entering an extended absence for Worker's Compensation Leave, use the **Comments** field on the **Absence Event Comments** page to record the claim number associated with the absence event.

Only one Worker's Compensation Leave event can be entered per day. If a single Worker's Compensation Leave event is entered for an employee and the hours need to be charged to two or more claim numbers, use the **Comments** field to indicate the number of hours charged to each claim.



# Entering Absence Event Detail as Part of Managing Extended Absence Process

Click the **Details** link associated with the absence request on the **Absence Event** page to open the **Absence Event Input Detail** page. Then click the **Comments** link near the bottom of the page.

Absence Event Input Detail

Absence Event

Absence Event Input Detail

Absence Take

Absence Reason

Entry Source Administrator Absence Event

Workflow Status

\*Process Action

☐ Voided Indicator

☐ Manager Approved

Absence Type

Event Priority 0

Last Updated

Process Status Not Processed

Calendar Group ID

Process Date

First Processed Date

Absence Begin / End Data

\*Begin Date

End Date

Original Begin Date

Partial Days

User Defined Fields

User Defined Fields 1

Date 1

Character 1

Monetary 1

Decimal 1

Currency 1

User Defined Fields 2

Date 2

Character 2

Monetary 2

Decimal 2

Currency 2

User Defined Fields 3

Date 3

Character 3

Monetary 3

Decimal 3

Currency 3

User Defined Fields 4

Date 4

Character 4

Monetary 4

Decimal 4

Currency 4

Override

Entitlement

Adjustment

Comments

OK Cancel Refresh

Absence Event Comments

Absence Event

Absence Event Comments

Comment

OK Cancel Refresh



# Obtaining Approval as Part of Managing Extended Absence Process

The following extended absences first are set up by the Payroll Administrator, followed by the second level of approval performed by the HR Administrator:

- **FML** (Family Medical Leave)
- **STD** (Short Term Disability)
- **LTD** (Long Term Disability)
- **WCL** (Worker's Compensation)



# Obtaining Approval as Part of Managing Extended Absence Process (continued)

Cardinal does not automatically route extended absence events entered by the Payroll Administrator. The Payroll Administrator must manually request (i.e., email) that the HR Administrator approve extended absence events entered by the Payroll Administrator.

To approve the extended absence, the HR Administrator navigates to the **Absence Event** page to approve:

- Step 1: Identify the appropriate extended absence request.
- Step 2: Click the **Details** link in the **Details** field for that request to access the **Absence Event Input Details** page.
- Step 3: Select the **Manager Approved** box.
- Step 4: Click the **OK** button to return to the **Absence Event** page.
- Step 5: Click the **Save** button.



# Obtaining Approval as Part of Managing Extended Absence Process (continued)

Absence Event Input Detail

Absence Event

Absence Event Input Detail

Absence Take: STD TAKE ELEM

Absence Reason: STD VSDP Short Term Disability

Entry Source: Administrator Absence Event

Workflow Status

\*Process Action: Normal

☐ Voided Indicator

☒ Manager Approved

Absence Type: VSDP Short Term Disability

Event Priority: 0

Last Updated

Process Status: Not Processed

Calendar Group ID

Process Date

First Processed Date

Absence Begin / End Data

\*Begin Date: 02/08/2017

End Date: 02/28/2017

Original Begin Date

Partial Days: None

User Defined Fields

User Defined Fields 1

Date 1

Character 1

User Defined Fields 2

Date 2

Character 2



# Obtaining Approval as Part of Managing Extended Absence Process (continued)

The **Workflow Status** field changes to **Approved**.

Navigation: Favorites ▾ Main Menu ▾ > Global Payroll & Absence Mgmt ▾ > Payee Data ▾ > Maintain Absences ▾ > Absence Event

Absence Event Entry | Forecast Messages

Employee ID EMP00000028    Empl Record 0    Name ROSA PARKS

From 11/17/2016    Through 05/18/2017    Refresh    Forecast

Absence Events ⓘ    Personalize | Find | View All | 1-5 of 5    First    Last

Absence Take	Description	*Begin Date	End Date	Partial Hours	*Process Action	Voided	Original Begin Date	Details	Entry Source	Workflow Status
VAC TAKE ELEM ⓘ	Vacation	02/13/2017 ⓘ	02/13/2017 ⓘ		Normal ▾	<input type="checkbox"/>	02/13/2017 ⓘ	Details	Manager Timesheet	Saved
VAC TAKE ELEM ⓘ	Vacation	02/08/2017 ⓘ	02/10/2017 ⓘ		Normal ▾	<input type="checkbox"/>	02/08/2017 ⓘ	Details	Employee Timesheet	Saved
STD TAKE ELEM ⓘ	VSDP Short Term Disability	02/08/2017 ⓘ	02/28/2017 ⓘ		Normal ▾	<input type="checkbox"/>	02/08/2017 ⓘ	Details	Administrator Absence Event	Approved
VAC TAKE ELEM ⓘ	Vacation	01/20/2017 ⓘ	01/20/2017 ⓘ		Normal ▾	<input type="checkbox"/>	01/20/2017 ⓘ	Details	Employee Timesheet	Approved
VAC TAKE ELEM ⓘ	Vacation	12/18/2016 ⓘ	12/18/2016 ⓘ		Normal ▾	<input type="checkbox"/>	12/18/2016 ⓘ	Details	Employee Timesheet	Cancelled

Save    Return to Search    Notify    Refresh

Absence Event Entry | Forecast Messages



# Reviewing Current and Future Absence Balances

Use the inquiry page, **Review Absence Balances**, to view an employee's current entitlement balance.

Click the **Review Absence Balances** link from the **Maintain Absences** page to access the **Review Absence Balances** page.

Navigate to this page using the following path:

**Cardinal FIN > Cardinal HCM > Main Menu > Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > Review Absence Balances**

From the search page, enter the employee criteria and click the **Search** button.

Review Absence Balances

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Empl ID [begins with] EMP00000028 x

Empl Record [=] 0

Name [begins with]

Last Name [begins with]

Second Last Name [begins with]

Alternate Character Name [begins with]

Middle Name [begins with]

☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

Search Results

View All First 1 of 1 Last

Empl ID	Empl Record	Name	First Name	Last Name	Second Last Name	Alternate Character Name	Middle Name
EMP00000028	0	ROSA PARKS	ROSA	PARKS	(blank)	(blank)	(blank)



# Review Absence Balances Page

The **Review Absence Balances** page appears. This page has the following tabs:

- **Current Balance**
- **Forecast Balance**
- **Forecast Messages**

Favorites ▾Main Menu ▾ > Global Payroll & Absence Mgmt ▾ > Payee Data ▾ > Maintain Absences ▾ > Review Absence Balances

Current BalanceForecast BalanceForecast Messages

Employee ID EMP00000028Empl Record 0Name ROSA PARKS

Absence Entitlement Current BalancePersonalize | Find | View All | (2) | 1-10 of 26First1-10 of 26Last

Accumulator BalanceUser Keys (F7)

Accumulator Period	Entitlement Element	Element Name	Amount	From	Through
Year to Date	VAC ENT ELEM	VAC ENT ELEM_BAL	12.000000	01/10/2016	01/09/2017
Year to Date	ALI ENT ELEM	ALI ENT ELEM_BAL	0.000000	01/10/2016	01/09/2017
Year to Date	CSL ENT ELEM	CSL ENT ELEM_BAL	18.000000	01/10/2016	01/09/2017
Year to Date	MIL ENT ELEM	MIL ENT ELEM_BAL	0.000000	10/01/2015	09/30/2016
Year to Date	MIP ENT ELEM	MIP ENT ELEM_BAL	0.000000	10/01/2015	09/30/2016
Year to Date	MLD ENT ELEM	MLD ENT ELEM_BAL	0.000000	01/10/2016	01/09/2017
Year to Date	PD1 ENT ELEM	PD1 ENT ELEM_BAL	0.000000	01/10/2016	01/09/2017
Year to Date	PD2 ENT ELEM	PD2 ENT ELEM_BAL	0.000000	01/10/2016	01/09/2017
Year to Date	BMO ENT ELEM	BMO ENT ELEM_BAL	0.000000	01/10/2016	01/09/2017
Year to Date	DLR ENT ELEM	DLR ENT ELEM_BAL	0.000000	01/10/2016	01/09/2017

Return to Search

Notify

Refresh

Current Balance | Forecast Balance | Forecast Messages





# Current Balance Tab

The **Current Balance** tab displays the absence balances for each absence type and includes the **Entitlement Element** (absence type), the **Amount** (current balance in hours) and the accumulator date range (**From** and **Through**); the range reflects the cumulative leave year.

Favorites ▾Main Menu ▾ > Global Payroll & Absence Mgmt ▾ > Payee Data ▾ > Maintain Absences ▾ > Review Absence Balances

Current Balance

Forecast Balance

Forecast Messages

Employee ID EMP00000028Empl Record 0Name ROSA PARKS

Absence Entitlement Current Balance

Personalize | Find | View All | [Print] [Grid] First 1-10 of 26 Last

Accumulator Balance

User Keys

[Filter]

Accumulator Period	Entitlement Element	Element Name	Amount	From	Through
Year to Date	VAC ENT ELEM	VAC ENT ELEM_BAL	12.000000	01/10/2016	01/09/2017
Year to Date	ALI ENT ELEM	ALI ENT ELEM_BAL	0.000000	01/10/2016	01/09/2017
Year to Date	CSL ENT ELEM	CSL ENT ELEM_BAL	16.000000	01/10/2016	01/09/2017
Year to Date	MIL ENT ELEM	MIL ENT ELEM_BAL	0.000000	10/01/2015	09/30/2016
Year to Date	MIP ENT ELEM	MIP ENT ELEM_BAL	0.000000	10/01/2015	09/30/2016
Year to Date	MLD ENT ELEM	MLD ENT ELEM_BAL	0.000000	01/10/2016	01/09/2017
Year to Date	PD1 ENT ELEM	PD1 ENT ELEM_BAL	0.000000	01/10/2016	01/09/2017
Year to Date	PD2 ENT ELEM	PD2 ENT ELEM_BAL	0.000000	01/10/2016	01/09/2017
Year to Date	BMO ENT ELEM	BMO ENT ELEM_BAL	0.000000	01/10/2016	01/09/2017
Year to Date	DLR ENT ELEM	DLR ENT ELEM_BAL	0.000000	01/10/2016	01/09/2017

Return to Search

Notify

Refresh

Current Balance | Forecast Balance | Forecast Messages



# Forecast Balance Tab

The **Forecast Balance** tab permits forecasting a specific absence type for the employee. After clicking the **Forecast Balance** tab, the **Forecast Balance** page displays. Select the **Absence Take Element**.

- Enter a date value in the **As Of Date** field.
- Click the **Forecast** button.

The information displays for the absence type you selected.

The following fields display:

- **Secondary Element** - Defaults to the Absence Take Element
- **Forecast Element** - The name of the balance accumulator
- **Type** - Always defaults to **Accumulator**
- **Numeric Value** - Forecasted entitlement balance
- **Character Value** and **Date Value**: Fields are not used in Cardinal

Forecast Balance Results Detail

Secondary Element	Forecast Element	Type	Numeric Value	Character Value	Date Value
			0.000000		



# Forecast Balance Tab (continued)

[Favorites](#) > [Main Menu](#) > [Global Payroll & Absence Mgmt](#) > [Payee Data](#) > [Maintain Absences](#) > [Review Absence Balances](#)

[Current Balance](#) **[Forecast Balance](#)** [Forecast Messages](#)

Employee ID EMP00000028 Empl Record 0 Name **ROSA PARKS**

Absence Take Element

As Of Date

**Forecast Balance Results Detail** [Personalize](#) | [Find](#) | [View All](#) |  |  First 1 of 1 Last

[Forecast Results](#) [Accumulator Results](#) [User Keys](#)

Secondary Element	Forecast Element	Type	Numeric Value	Character Value	Date Value
			0.000000		

[Current Balance](#) | [Forecast Balance](#) | [Forecast Messages](#)



# Forecast Balance Tab (continued)

Favorites ▾Main Menu ▾> Global Payroll & Absence Mgmt ▾> Payee Data ▾> Maintain Absences ▾> Review Absence Balances

Current BalanceForecast BalanceForecast Messages

Employee ID EMP00000028Empl Record 0Name ROSA PARKS

Absence Take Element VAC TAKE ELEM

As Of Date 12/31/2017

Forecast

Forecast Balance Results Detail

Personalize | Find | View All | |

First 1 of 1 Last

Forecast ResultsAccumulator ResultsUser Keys

Secondary Element	Forecast Element	Type	Numeric Value	Character Value	Date Value
VAC TAKE ELEM	VAC ENT ELEM_BAL	Accumulatr	16.000000		

Return to Search

Notify

Refresh

Current Balance | Forecast Balance | Forecast Messages



# Retroactive Processing

Cardinal will only process prior period adjustments (absence entry, schedule change, balance adjustments, etc.) up to one year back.

If an exception to the one year limit is needed, contact [Central Office Payroll](#).



## Lesson 2: Checkpoint

Now is your opportunity to check your understanding of the course material. Read the question and make note of your answer below.



1. What information is available to view on the Current Balance tab?



2. In order to find out what the balance will be for an employee at a future date, you would use the \_\_\_\_\_ tab.



3. This tab is not typically used by Administrators because the forecasted messages are related to data or configuration issues.



## Lesson 2: Summary

2

### Maintaining Absences

In this lesson, you learned:

- How to enter and modify absences requests and events
- How to enter and manage extended absences
- How to review employee absence balances



# Lesson 3: Introduction

3

## Adjusting Absence Entitlement Balances

This lesson covers the following topics:

- Adjusting Absence Entitlement Balances
- Enter and Manage Donated Leave





# Manual Adjustment of Absence Entitlement Balances

Not all absence types are granted based on an annual entitlement or accrual during the leave year. Some absence types must be manually set up for an employee.

Some examples include:

- **ELP** (Educational Leave)
- **ALI** (Annual Leave Incentive)
- **MIL** (Military Leave)
- **ERL** (Employee Recognition Program)
- **ESP** (Employee Suggestion Program)

The balances are manually granted or adjusted.

Absence type balances are also adjusted where there is an exception. There are a few exceptions for absence type balances.

It is better to first investigate the root cause of the issue as opposed to quickly adjusting the balance without verifying the facts. For example, if the employee's vacation accrual is incorrect, there may be an underlying reason, e.g., incorrect Company Seniority Date, causing the incorrect accruals.



# Manual Adjustment of Absence Entitlement Balances: Absences Page Search

Use the **Absences** page to adjust an employee's absence balance.

Navigate to this page using the following path:

**Cardinal FIN > Cardinal HCM > Main Menu > Global Payroll & Absence Mgmt > Payee Data > Adjust Balances > Absences**

Favorites ▾Main Menu ▾>Global Payroll & Absence Mgmt ▾>Payee Data ▾>Adjust Balances ▾>Absences

### Absences

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Empl ID

begins with ▾

EMP00000028 x

Empl Record

= ▾

0

Pay Group

begins with ▾

🔍

Calendar ID

begins with ▾

🔍

Name

begins with ▾

Period Begin Date

>= ▾

📅

Period End Date

<= ▾

📅

☐ Case Sensitive

Search

Clear

Basic Search 📄

Save Search Criteria



# Manual Adjustment of Absence Entitlement Balances: Absences Page Search (continued)

On the **Absences** search page, enter search criteria to access the employee record that requires adjustment:

- **Empl ID or Name**

After entering the employee information select one of the following to identify when the balance adjustment is effective:

- **Calendar ID:** Run control parameter for the Calculate Absence and Payroll process that identifies the pay period for which the process is run.
- **Period Begin Date:** The date when the absence begins (enter date or click the **Calendar** icon to choose).
- **Period End Date:** The date when the absence ends (enter the date or click the **Calendar** icon to choose).

The screenshot shows the 'Absences' search page. At the top, there is a breadcrumb trail: Favorites > Main Menu > Global Payroll & Absence Mgmt > Payee Data > Adjust Balances > Absences. Below this, the page title 'Absences' is displayed. A message states: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There is a button labeled 'Find an Existing Value'. Below this is a section titled 'Search Criteria' with a dropdown arrow. The search criteria include: 'Empl ID' with a dropdown set to 'begins with' and a text box containing 'EMP00000028'; 'Empl Record' with a dropdown set to '=' and a text box containing '0'; 'Pay Group' with a dropdown set to 'begins with' and a text box with a search icon; 'Calendar ID' with a dropdown set to 'begins with' and a text box with a search icon; 'Name' with a dropdown set to 'begins with' and a text box; 'Period Begin Date' with a dropdown set to '>=' and a text box with a calendar icon; and 'Period End Date' with a dropdown set to '<=' and a text box with a calendar icon. The 'Pay Group', 'Calendar ID', and 'Period End Date' fields are highlighted with red boxes. At the bottom, there is a checkbox for 'Case Sensitive' and buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.



# Manual Adjustment of Absence Entitlement Balances: Absences Page Search (continued)

For absence adjustments, except **VAC** (Vacation) and **SCK** (Traditional Sick), make the adjustment to the pay period that the employee should be able to start taking the leave type (meaning it will be effective on the period begin date).

In the rare instances in which **VAC** and **SCK** leave require adjustments, you make the adjustment in the pay period **prior** to the period that you want the employee to be able to take the **VAC** or **SCK** leave. For example, if you want the employee to be able to use a **VAC** leave adjustment during the pay period ending March 9, make the **VAC** adjustment using the pay period end date February 24.

Favorites ▾Main Menu ▾ > Global Payroll & Absence Mgmt ▾ > Payee Data ▾ > Adjust Balances ▾ > Absences

### Absences

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Empl ID

begins with ▾

EMP00000028 x

Empl Record

= ▾

0

Pay Group

begins with ▾

🔍

Calendar ID

begins with ▾

🔍

Name

begins with ▾

Period Begin Date

>= ▾

📅

Period End Date

<= ▾

📅

☐ Case Sensitive

Search

Clear

Basic Search 📄

Save Search Criteria



# Calendar ID Lookup

When using the **Calendar ID** lookup, the calendars available for the selected employee appear at the bottom of the page. To choose the calendar for the effective date of the change, select it from the search list.

Favorites ▾Main Menu ▾ > Global Payroll & Absence Mgmt ▾ > Payee Data ▾ > Adjust Balances ▾ > Absences

### Absences

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Empl ID

begins with ▾

EMP00000028

Empl Record

= ▾

0

Pay Group

begins with ▾

SEMIMNTHLY

🔍

Calendar ID

begins with ▾

SMLV201517

🔍

Name

begins with ▾

Period Begin Date

>= ▾

📅

Period End Date

<= ▾

📅

☐ Case Sensitive

Search

Clear

Basic Search 🖨

Save Search Criteria

### Search Results

View AllFirst ◀ 1-100 of 161 ▶ Last

Empl ID	Empl Record	Pay Group	Calendar ID	Name	Period Begin Date	Period End Date
EMP00000028	0	SEMIMNTHLY	SMLV201101	ROSA PARKS	01/10/2011	01/24/2011
EMP00000028	0	SEMIMNTHLY	SMLV201122	ROSA PARKS	11/25/2011	12/09/2011
EMP00000028	0	SEMIMNTHLY	SMLV201123	ROSA PARKS	12/10/2011	12/24/2011
EMP00000028	0	SEMIMNTHLY	SMLV201124	ROSA PARKS	12/25/2011	01/09/2012



# Manual Adjustment of Absence Entitlement Balances: Absences Page

Once the employee and calendar have been selected, the **Absences** page displays. The top section of this page populates based on the values entered on the search page.

Review this information to confirm that the right selection was made.

Favorites ▾Main Menu ▾>Global Payroll & Absence Mgmt ▾>Payee Data ▾>Adjust Balances ▾>Absences

### Absences

Employee ID EMP00000028

Pay Group SEMIMNTHLY

Calendar ID SMLV201517

Name ROSA PARKS

Description Semi-Monthly Salaried AM

Begin Date 09/10/2015

Empl Record 0

Pay Entity COVA

End Date 09/24/2015

Balance Adjustments

Personalize | Find | View All | First 1 of 1 Last

Element Name	Description	Balance Adjustment	Begin Date	End Date	Comments		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		

Save

Return to Search

Notify



# Steps to Manually Adjust Absence Entitlement Balances

To make a balance adjustment for an absence type use the following steps:


- Select the absence type in the **Element Name** field. The **Description** field will automatically populate based on the selection.
- Click in the **Balance Adjustment** field and enter the amount in hours. The balance adjustment can be either positive or negative and will be increased or decreased by the hours entered here.

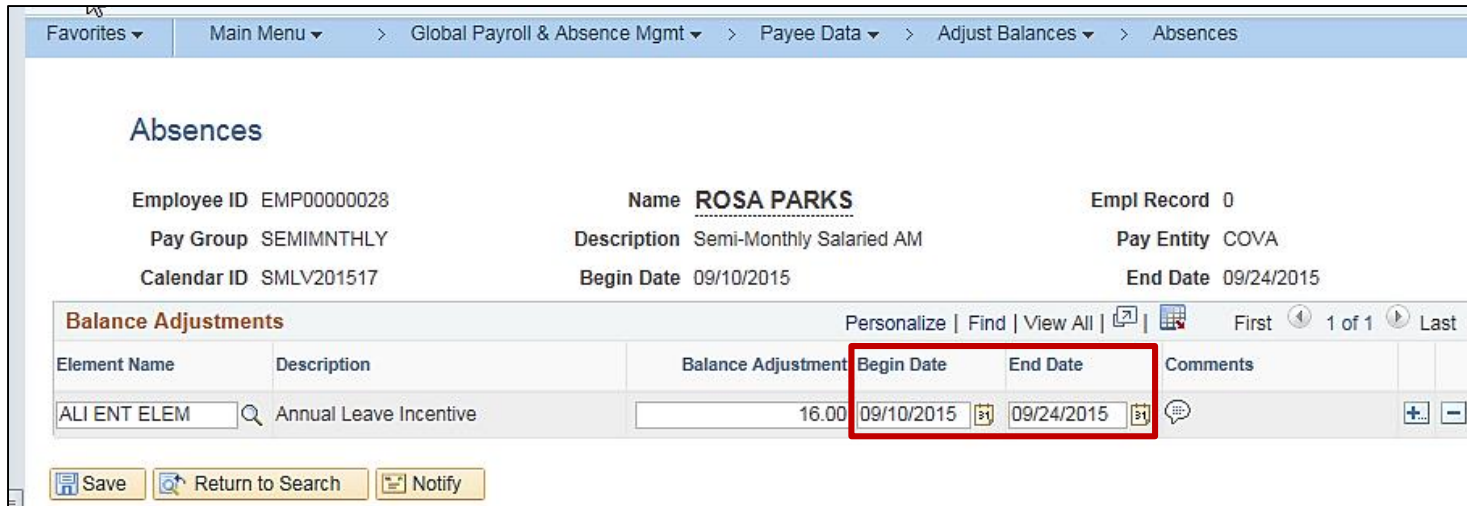
The screenshot shows a web application interface for managing absences. At the top is a navigation bar with links: Favorites, Main Menu, Global Payroll & Absence Mgmt, Payee Data, Adjust Balances, and Absences. Below this is a section titled 'Absences' with employee details: Employee ID EMP00000028, Name ROSA PARKS, Empl Record 0, Pay Group SEMIMNTHLY, Description Semi-Monthly Salaried AM, Pay Entity COVA, Calendar ID SMLV201517, Begin Date 09/10/2015, and End Date 09/24/2015. Below the details is a table titled 'Balance Adjustments'. The table has columns: Element Name, Description, Balance Adjustment, Begin Date, End Date, and Comments. The first row shows 'ALI ENT ELEM' in the Element Name column, 'Annual Leave Incentive' in the Description column, '16.00' in the Balance Adjustment column, '09/10/2015' in the Begin Date column, '09/24/2015' in the End Date column, and a comment icon in the Comments column. At the bottom of the interface are buttons for Save, Return to Search, and Notify.

Element Name	Description	Balance Adjustment	Begin Date	End Date	Comments
ALI ENT ELEM	Annual Leave Incentive	16.00	09/10/2015	09/24/2015	



# Steps to Manually Adjust Absence Entitlement Balances (continued)



- Once an Element Name is selected the Begin Date and End Date populate from the Calendar ID designated in the search criteria. Clear the Begin Date and End Date fields.
- Click the Comments icon (  ). The Comments field is a mandatory field. A comment about the leave is required to save the adjustment.




The screenshot shows a web application interface for adjusting absence entitlement balances. The breadcrumb trail at the top reads: Favorites > Main Menu > Global Payroll & Absence Mgmt > Payee Data > Adjust Balances > Absences.

**Absences**

Employee ID EMP00000028      Name **ROSA PARKS**      Empl Record 0  
Pay Group SEMIMNTHLY      Description Semi-Monthly Salaried AM      Pay Entity COVA  
Calendar ID SMLV201517      Begin Date 09/10/2015      End Date 09/24/2015

**Balance Adjustments**      Personalize | Find | View All |  |       First 1 of 1 Last

Element Name	Description	Balance Adjustment	Begin Date	End Date	Comments
ALI ENT ELEM	Annual Leave Incentive	16.00	09/10/2015	09/24/2015	

Buttons: Save, Return to Search, Notify





# Steps to Manually Adjust Absence Entitlement Balances (continued)

The **Absence Comments** page displays. Enter a brief explanation of the adjustment in the **Comments** field.

The User ID of the person making the change is auto-populated in the **Last Update User ID** field and the date the change was made is auto-populated in the **Last Updated Date/Time** field. Note this is not visible until the **OK** button has been clicked and the **Absence Comments** page displays.

Click the **OK** button to return to the **Absences** page.

PI for Absence Entitlement

Help

### Absence Comments

Empl ID:	EMP00000028	Name:	ROSA PARKS	Empl Record:	0
Pay Group:	SEMIMNTHLY	Description:	Semi-Monthly Salaried AM		
Calendar ID:	SMLV201517	Begin Date:	09/10/2015	End Date:	09/24/2015
Element Name:	ALI ENT ELEM	Description:	Annual Leave Incentive	Balance Adjustment:	16.000000

Adjustment Comments

Comments:

Employee Approved by Department Head James Smith for 16 hours of Annual Leave Incentive.

Last Update User ID:

Last Update Date/Time:

OK

Cancel



# Steps to Manually Adjust Absence Entitlement Balances (continued)

Click the **Save** button to save the absence adjustment.

Adjustments made in current open period and prior periods are processed the next time the **Calculate Absence and Payroll** process runs.

Adjustments that are future dated process when the calendar selected is processed.

Favorites ▾Main Menu ▾ > Global Payroll & Absence Mgmt ▾ > Payee Data ▾ > Adjust Balances ▾ > Absences

### Absences

Employee ID EMP00000028

Pay Group SEMIMNTHLY

Calendar ID SMLV201517

Name ROSA PARKS

Description Semi-Monthly Salaried AM

Begin Date 09/10/2015

Empl Record 0

Pay Entity COVA

End Date 09/24/2015

Balance Adjustments

Personalize | Find | View All | First ◀ 1 of 1 ▶ Last

Element Name	Description	Balance Adjustment	Begin Date	End Date	Comments		
ALI ENT ELEM	Annual Leave Incentive	16.000000	09/10/2015	09/24/2015			

Save

Return to Search

Notify



# Reasons to Manually Adjust Absence Entitlement Balances

There are various reasons that a balance requires adjustment.

If there are retroactive changes to an employee's anniversary date in PMIS, the Absence Management Administrator is notified as the employee's absence balance may need to be adjusted. The PMIS interface will send over the new **Company Seniority Date**, which is the date field used to determine years of service for some accruals, e.g., VAC (Vacation), SCK (Traditional Sick), and the VAC carryover maximum. The field is not effective dated in Cardinal, so retroactive absence calculations will not be triggered. The new seniority date will be used in absence calculations going forward starting with the pay period **once** the new date was received in Cardinal. The Absence Management Administrator would need to contact the Payroll Manager to set a trigger to reprocess any incorrect accruals prior to that period.

Balance adjustments entered directly into Cardinal on the **Absences** page are not displayed on the timesheet until the **Calendar ID** is finalized at the end of the pay period. However, once the balance adjustment is entered and processed by the daily Calculate Absence and Payroll process, the balance available to the employee for leave entry and forecasting is updated accordingly.

Once the Calculate Absence and Payroll process runs and the pay period is finalized, a Self Service employee can view the adjusted balance as of the end of the last pay period.



# Processing Leave Donations

Employees who wish to donate leave to another employee should contact their supervisor for guidance.

Absence Management Administrators:

- Enter and manage donated leave by entering balance adjustments for the recipient and donors.
- Return unused donated leave to the donors after the recipient no longer needs or qualifies for donated leave by entering balance adjustments for the recipient and donors.

For more detailed information about completing a leave donation, see the job aid entitled **501 TA366: Leave Donation Process** located on the Cardinal website in **Job Aids** under **Training**.



## Lesson 3: Summary

3

### Adjusting Absence Entitlement Balances

In this lesson, you learned:

- Adjust absence entitlement balances for employees
- Process leave donations



# Lesson 4: Introduction

4

## Managing Absence and Payroll Processing

This lesson covers the following topics:

- Overview of the Calculate Absence and Payroll batch process
- Reviewing Absence and Payroll Processing
- Reviewing Results by Calendar Group or Calendar

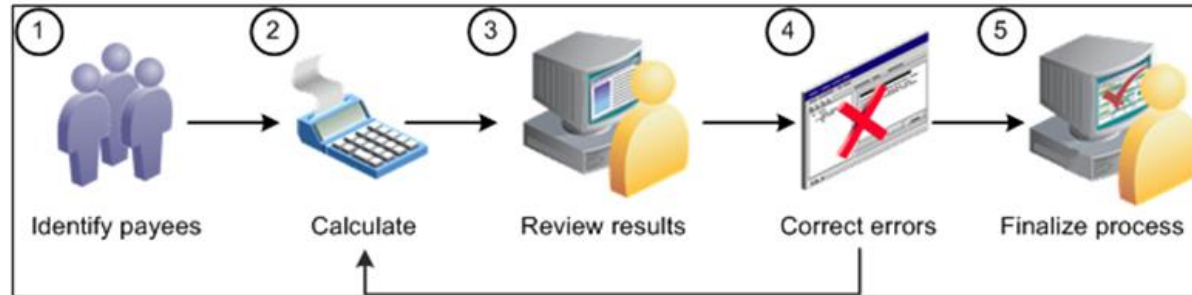
# Calculate Absence and Payroll Process

Calculate Absence and Payroll is a daily batch process that calculates all absence entitlements (automatic and granted) and takes. This process runs in batch at 11:30AM, 3:30PM, and 3:30AM.

Calculate Absence and Payroll includes:

- Absence Entitlements - This process updates frequency-based entitlement and makes entitlements available.
- Absence Takes - During this process, Cardinal calculates the number of hours per day for each take and deducts hours taken from balances.
- Retroactive Changes - This process updates all intervening time periods up to the present when an event is added, updated, or deleted, changes are made to job data or a work schedule that affects a period has already been processed.

The calendar must be manually finalized at the close of the pay period by the Payroll Administrator. **Only Payroll Administrators and the Cardinal Post Production Team have access the run this process.**





# Absence and Payroll Processing View Options

There are various ways that you can view absence and payroll processing information:

- Review results by calendar group or calendar

Some of the items you can view are:

- Accumulators
- Absence Data





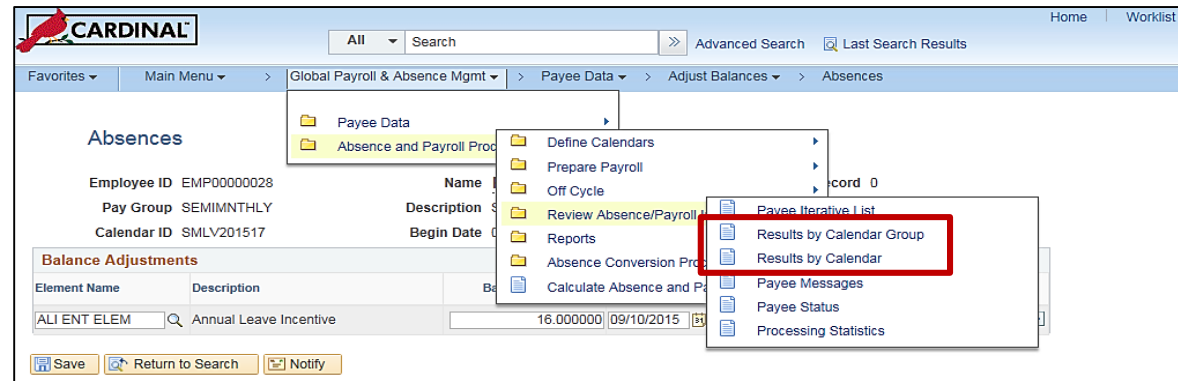
# Accessing Results by Calendar or Calendar Group


You have two options for reviewing results:

- Calendar
- Calendar Group

Navigate to either the Calendar or Calendar Group View using the following path:

**Cardinal FIN > Cardinal HCM > Main Menu > Global Payroll & Absence Mgmt > Absence and Payroll Processing > Review Absence/Payroll Info > Results by Calendar Group or Results by Calendar**






# Accessing Results by Calendar Group

The Calendar Group View is based on the semimonthly pay period. Results will display not only the Calendar ID selected, but other Calendar IDs with retroactive changes that impact it.

**Calendar ID** column shows the Calendar ID(s) for the pay periods that were processed as part of the calendar Group.

**Version Number** column shows the number of times a calendar was reprocessed for that employee.



Home | Worklist

All | Search

Advanced Search | Last Search Results

Favorites | Main Menu | Global Payroll & Absence Mgmt | Absence and Payroll Processing | Review Absence/Payroll Info | Results by Calendar Group

Calendar Group Results | Absence Data | Retro Calculation Deltas

JOHN DOEEmployeeEmpl ID 00000073500Empl Record 0

Calendar Group ID SMLV201205SMLV Cal Group 05 2012

Segment Information by Calendar

Personalize | Find | View All | First 1 of 1 Last

Calendar ID	Segment Begin Date	Segment End Date	Calculate Action	Segment Number	Version Number	Revision Number	Segment Detail
SMLV201205	03/10/2012	03/24/2012	Calculate	1	1	1	Segment Detail

Additional Result Pages

Positive Input - Absence

Positive Input - Payroll

Generated Positive Input

Absence Data

Retro Calculation Deltas

Return to Search | Previous in List | Next in List | Notify

Calendar Group Results | Absence Data | Retro Calculation Deltas



# Absence Data Results by Calendar

Navigate to the Calendar View using the following path:

**Cardinal FIN > Cardinal HCM > Main Menu > Global Payroll & Absence Mgmt > Absence and Payroll Processing > Review Absence/Payroll Info > Results by Calendar**

Navigating to the **Calendar Group** page, click the **Absence Data** link to open the **Absence Data** tab and view an employee's absence data by day. The daily data lists absence events by day, the hours accumulated for that day and other information associated with each absence event. Use this information to check the absence types and hours an employee used during a defined period of time.

Favorites ▾Main Menu ▾ > Global Payroll & Absence Mgmt ▾ > Absence and Payroll Processing ▾ > Review Absence/Payroll Info ▾ > Results by Calendar

Calendar ResultsEarnings and DeductionsAccumulatorsSupporting Elements

**ROSA PARKS**EmployeeEmpl ID 00000249500Empl Record 0

Calendar ID SMLV201609Pay Group SEMIMNTHLYSemi-Monthly Salaried AM

Segment Information by Calendar GroupPersonalize | Find | View All | First 1 of 1 Last

Calendar Group ID	Segment Begin Date	Segment End Date	Calculate Action	Segment Number	Version Number	Revision Number	Segment Detail
SMLV201609	05/10/2016	05/24/2016	Calculate	1	1	1	<a href="#">Segment Detail</a>

Additional Result Pages

Positive Input - Absence

Positive Input - Payroll

Generated Positive Input

**Absence Data**

Retro Calculation Deltas

Return to Search

Previous in List

Next in List

Notify

Calendar Results | Earnings and Deductions | Accumulators | Supporting Elements



# Absence Data Results by Calendar Group or Calendar: Schedule Data and Config Fields Tab

Click the **Schedule Data and Config Fields** tab. Additional fields display including a **Work Schedule** field.

Click the **Work Schedule** link to access information about the employee's work schedule on the day of the absence event.

Favorites ▾Main Menu ▾> Global Payroll & Absence Mgmt ▾> Absence and Payroll Processing ▾> Review Absence/Payroll Info ▾> Results by Calendar

Calendar ResultsAbsence DataRetro Calculation Deltas

ROSA PARKSEmployeeEmpl ID 00000073500Empl Record 0

Calendar ID SMLV201609Pay Group SEMIMNTHLY

Calendar InformationFind | View AllFirst1 of 1Last

Calendar Group ID SMLV201609Description SMLV Cal Group 09 2016

Segment Number 1Version 1Revision 1

Gross Result Value 0.000000USDNet Result Value 0.000000USD

Absence Daily Data ?Personalize | Find | View All | First1 of 1Last

Absence Detail1Absence Detail2Begin / End DataSchedule Data and Config FieldsRelated Elements

Element Name	Description	Absence Date	Configurable Fields	Scheduled Work Hours	Work Schedule	Alternate Scheduled Hours	Alternate Work Schedule
PER TAKE ELEM	VSDP Personal Leave	05/20/2016	Configurable Fields	8.00	Work Schedule		Alternate Work Schedule

Return To Main Result Pages

Return to SearchPrevious in ListNext in ListNotify

Calendar Results | Absence Data | Retro Calculation Deltas



# View Accumulator Results: Employee Absence Entitlement and Granted Absence Balances

Click the **Accumulators** tab to view an employee's usage of absence entitlements balances (e.g., Vacation) and granted absence balances (e.g., FML usage).

Five absence type accumulator results display. Click the **View All** link to expand the Accumulators section.

Favorites

Main Menu

Global Payroll & Absence Mgmt

Absence and Payroll Processing

Review Absence/Payroll Info

Results by Calendar

Calendar Results

Earnings and Deductions

Accumulators

Supporting Elements

EDGAR POE

Employee

Empl ID EMP00000030

Empl Record 0

Calendar ID SMLV201615

Pay Group SEMIMNTHLY

Semi-Monthly Salaried AM

Calendar Information

Find | View All

First 1 of 1 Last

Calendar Group ID SMLV201615

Description SMLV Cal Group 15 2016

Segment Number 1

Version 1

Revision 1

Gross Result Value 0.000000 USD

Net Result Value 0.000000 USD

Accumulators

Personalize | Find | View All

First 1-5 of 83 Last

Accumulator Results

User Keys

Period	Element Name	Amount	Description	From	Through
Calendar Period	ALI PRD ACUM_ACRL	0.000000	ALI Period Accrual	08/10/2016	08/24/2016
Calendar Period	DLR PRD ACUM_ACRL	0.000000	DLR Period Accrual	08/10/2016	08/24/2016
Calendar Period	DSK PRD ACUM_ACRL	0.000000	DSK Period Accrual	08/10/2016	08/24/2016
Calendar Period	MBL PRD ACUM_ACRL	0.000000	MBL Period Accrual	08/10/2016	08/24/2016
Calendar Period	SCK PRD ACUM_ACRL	0.000000	SCK Period Accrual	08/10/2016	08/24/2016

Return to Search

Previous in List

Next in List

Notify

Calendar Results | Earnings and Deductions | Accumulators | Supporting Elements



# Running Absence Conversion Processing

The Payroll Administrator manually initiates the absence conversion process on the day the pay period is allocated after the calendar has been finalized. It is run one time for the pay period.

This process pushes the absence earnings to the Payable Time table and combines them with productive time earnings. This table is then used by reports, interfaces, and allocation programs.

The screenshot shows the 'To Payroll for North America' page in the Cardinal HR system. The top navigation bar includes the 'CARDINAL' logo, a search bar with 'All' and 'Search' dropdowns, and links for 'Home' and 'Worklist'. Below this is a breadcrumb trail: 'Favorites > Main Menu > Global Payroll & Absence Mgmt > Absence and Payroll Processing > Absence Conversion Processing > To Payroll for North America'. The main heading is 'To Payroll for North America'. Below the heading is a search instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two buttons: 'Find an Existing Value' and 'Add a New Value'. A 'Search Criteria' section is expanded, showing a 'Run Control ID' dropdown set to 'begins with' and an empty text input field. Below this is a checkbox for 'Case Sensitive'. At the bottom of the search section are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. At the very bottom of the page are links for 'Find an Existing Value' and 'Add a New Value'.



# Lesson 4: Summary

4

## Managing Absence and Payroll Processing

In this lesson, you learned:

- Review absence information
- Review results by Calendar Group or Calendar ID



# Lesson 5: Absence Management Maintenance Hands-On Practice

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.







# Course Summary

TA366

Absence Management Maintenance

In this course, you learned:

- Identify key Absence Management concepts
- Identify Absence Management processes
- Describe Absence Management integration and interfaces
- Enter and modify absence requests and events
- Enter and manage extended absences
- Review employee absence balances
- Adjust employee absence entitlement balances



# Course Summary (continued)

TA366

## Absence Management Maintenance

- Initiate and manage a leave donation request
- Calculate Absence and Payroll batch process
- Review absence and payroll information
- Review results by Calendar Group and Calendar ID
- Run absence conversion processing



# Course Evaluation

Congratulations! You successfully completed the **501 TA366: Absence Management Maintenance** course.

Your instructor will provide instructions on how to access the evaluation survey for this course.





# Appendix

- Key Terms
- Flowchart Key



# Key Terms

**Absence Entitlement:** The hours or days an employee has accrued for an absence type (e.g., Vacation, VSDP Sick, VSDP Personal)

**Absence Event:** The consecutive period of time an employee is absent for the same reason (e.g., Vacation, VSDP Sick, VSDP Personal)

**Absence Reason:** Required when entering an absence type (e.g., Sick, Vacation) providing further classification for work-related absences (e.g., Flu, Chemotherapy, etc.).

**Absence Take:** The absence type and amount of time that an employee takes for an absence event

**Absence Take Element:** The code name given to a specific type of absence (e.g., Vacation is VAC\_TAKE\_ELEM)

**Accumulators:** Means of tracking hours or days of absence usage (accumulated time) based on pre-defined business rules

**Calculate Absence and Payroll:** Batch process that is run nightly (or ad hoc if needed) that processes absence data for the pay period

**Calendar Groups:** Identifies the calendars to process at the same time

**Calendar ID:** Run control parameter for the Calculate Absence and Payroll process that identifies the pay period for which the process is run



# Key Terms (continued)

**Calendar Periods:** Defines the pay period, e.g. semi-monthly pay period

**Calendars:** Identifies the run type (semi-monthly or annual), calendar period, and payees to process

**Entitlement Adjustment:** An increase or decrease made to an entitlement balance

**Entitlement Balance:** The number of hours of unused entitlement for a particular absence type (e.g., Vacation, VSDP Sick, VSDP Personal)



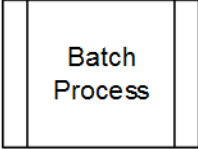
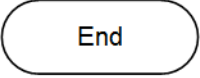
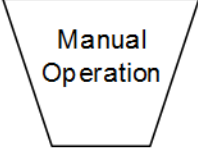
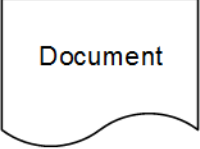
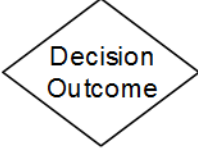
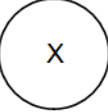
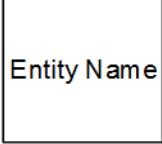
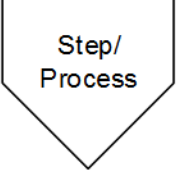
**Forecasting:** Process that compares an absence request to current and projected future absence entitlement balances to determine if an employee is eligible for and has sufficient balances of the selected absence type available for use

**Frequency-Based Entitlement:** Accrual that is earned at regular time intervals (e.g., Vacation that is accrued for each semi-monthly pay period or VSDP Personal leave that is granted at the beginning of each leave year)

**Time Reporting Codes (TRC):** Classifies hours recorded on the timesheet, (e.g., Regular (RGS), Overtime (OT1, EOT), Compensatory Leave (CPE))



# Flowchart Key

	Depicts a process step or interface.		Indicates point at which the process begins. Does not represent any activity.
	Specifies a batch process.		Indicates point at which the process ends. Does not represent any activity.
	Depicts a process step that is preformed manually.		Depicts a document of any kind, either electronic or hard copy.
	Defines the possible outcomes of a decision or analysis that took place in a step immediately preceding.		Indicates an on-page or intra process connector. Used to avoid complex overlapping connector lines or to continue a process on a subsequent page.
	Represents an entity (person, organization, etc.).		Connects steps between business processes.